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UNITED STATES DEPARTMENT OF AGRICULTURE
FOREIGN AGRICULTURAL SERVICE
WASHINGTON, D. C.

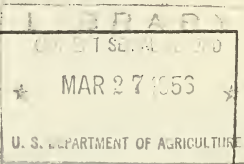
FT 1-56

January 10, 1956

MISCELLANEOUS TOBACCO DEVELOPMENTS

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Finnish Demand for U. S. Leaf May Increase

Finland's imports of unmanufactured tobacco in the January-August period of 1955, as indicated by clearances from bond, totaled 8.4 million pounds as compared with 7.5 million pounds in the comparable period of 1954. Takings of United States leaf, mainly flue-cured and Burley, increased from 2.5 to 2.7 million pounds, resulting from increased consumption of "American Blended" type cigarettes. Consumption of these brands, which contain from 50 to 75 percent United States leaf, now represents about 24 percent of total cigarette consumption in contrast to 20 percent last year.

The output of cigarettes in the first 8 months of 1955 was slightly below that of last year. The decline in production occurred because one of the principal cigarette manufacturers suspended production for two months while moving to a new and larger factory. Production has been resumed in the new factory at the rate of 2 million cigarettes a day. However, with the installation of the newly purchased equipment, a theoretical daily output of 4 million cigarettes may be attained by this manufacturer, who is the principal user of United States leaf in Finland.

French Tobacco Imports Up in First Half '55

Imports of unmanufactured tobacco by the French Tobacco Monopoly in first half 1955 totaled 33.1 million pounds--up 18.8 percent from the 27.9 million pounds imported in the corresponding period of 1954. Most of the increase occurred in larger takings from South American countries.

FRANCE: Imports of unmanufactured tobacco in the January-June periods, 1954-55

Country of Origin	January-June 1954	January-June 1955	Percent Change from January- June 1954
	<u>1,000 pounds</u>	<u>1,000 pounds</u>	
French Overseas Territories:	7,784	4,564	- 41.4
United States	2,919	4,952	+ 69.6
South America	3,181	7,449	+134.2
Oriental Countries	10,776	12,901	+ 19.7
Others	3,195	3,223	+ .9
Total.....	27,855	33,089	+ 18.8

Source: French Tobacco Monopoly (S.E.I.T.A.)

Imports of United States leaf increased 70 percent from the comparable six months last year. Imports of Kentucky fire-cured increased 2.6 million pounds, whereas flue-cured and Burley declined 74 and 7 percent respectively. The increase in takings of Kentucky fire-cured leaf was partially due to reduced consignments from the colonial territories, particularly Madagascar.

Takings of oriental tobaccos have been stepped up and may increase further due to a recent trade agreement concluded with Bulgaria, which includes tobacco as one of the items to be exported to France in exchange for French industrial goods. Also, the level of imports from South America may rise because of a recent trade agreement by the French Government, which authorized imports of Dominican Republic tobaccos with a minimum annual value of \$1 million (about 4 million pounds) in exchange for French goods.

Belgian Tobacco Imports Up Slightly

Belgium's imports of unmanufactured tobacco during the January-August period of 1955 totaled 31.9 million pounds--up 3.6 percent from the 30.8 million pounds imported during the corresponding period of 1954. Imports of oriental and non-U. S. flue-cured tobaccos increased about .5 and 1.0 million pounds, respectively, while imports of cigar leaf were down slightly.

Belgium: Imports of unmanufactured tobacco during the
January-August periods, 1954-55

Country of origin	January-August 1954	January-August 1955
	<u>1,000 pounds</u>	<u>1,000 pounds</u>
United States	13,542	13,455
Turkey.....	2,804	2,068
Indonesia	1,891	1,898
Dominican Republic.....	2/	2,255
Brazil.....	2,425	2,238
India	330	1,914
Greece	2/	926
Netherlands <u>1/</u>	1,013	754
Other	8,829	6,434
Total.....	30,834	31,942

1/ Re-exports.

2/ If any, included in other.

Takings of United States leaf continued to decline in the first eight months of 1955, and represented only 42.1 percent of total imports as compared with 43.9 percent last year. Takings of Burley and flue-cured from Italy, India, Canada, Rhodesia, and other African countries are being stepped-up because prices are lower in those countries than in the United States. It was reported by the local trade in Belgium that these types are comparable to United States types, but the quality of the leaf was believed to be lower.

The decline in imports of United States leaf is reported to be attributed to price considerations resulting from price controls on manufactured tobacco products which have caused a reduction in the profit margin of manufacturers. The 1,280,000 Belgian Franc (640,000 U. S. dollars) subsidy, which was granted by IRSIA at the end of 1954 to the West Flanders Tobacco Committee for research to improve the quality of Belgian tobacco, may adversely affect future shipments of United States leaf to Belgium. During 1955, research experiments were conducted with flue-cured varieties, such as Virginia Gold Leaf, Virginia Gold A, and Harrison Special 215 to determine whether or not they or other varieties of tobacco could be grown under the Belgian climatic and soil conditions. The results of these experiments are unknown as of this date.

Renewed Greek-Danish Trade Agreement Includes Tobacco

The Greek-Danish Trade Agreement, which expired on August 24, 1955, was extended for one year and includes tobacco as one of the items to be exported from Greece in exchange for Danish goods. No commodity lists are provided in the renewed agreement and trade will be carried on within the framework of the liberalized import regulations currently in effect in both countries. However, quotas have been established for a variety of Greek products, mainly agricultural, the importation of which is still subject to quantitative restrictions in Denmark. The Danish Government has agreed that if the quotas established in the agreement should be fully utilized prior to its expiration, the Danish authorities would give favorable consideration to any requests for increased quotas of certain products.

Venezuelan Cigarette Output Continues Upward

Output of cigarettes in Venezuela continued its upward trend through the first half of 1955, totaling 1.6 billion pieces--up 7.3 percent from the 1.5 billion produced during the comparable period of 1954. Output of other tobacco products is negligible.

VENEZUELA: Output of cigarettes, with comparisons

Period	"Black" " type Million pieces	"Light" type Million pieces	Total Million pieces
Annual:			
1950	688	1,256	1,944
1951	560	1,484	2,044
1952	471	2,019	2,482
1953	448	2,277	2,725
1954	486	2,509	2,995
January-June			
1954	1/	1/	1,480
1955	<u>1/</u>	<u>1/</u>	1,588

1/ Not available

Cigarette output during 1954 was almost double that of prewar. Output of the "black" type of cigarettes, which had been declining since prewar, turned upward in 1954. Output of the "light" type of cigarettes continues to rise and represents about 85 percent of the total production in contrast to less than 3 percent prewar. Although the output of cigarettes is increasing, it covers only about 75 percent of the demand, with most of the remainder imported from the United States.

The new cigarette factory in Maracay, which was largely financed by tobacco producers because of their dissatisfaction with tobacco prices, is having difficulties. The brand of cigarettes produced in this factory is not widely accepted by consumers. After the cigarette proved to be unpopular, the company began a belated advertising campaign, but to date it has not been successful.

German Cigarette Output Up 14.4 Percent

According to information in Die Tabak-Zeitung (Tobacco Gazette-Mainz) of October 7, output of cigarettes in the Republic of Germany during the January-August period of 1955 totaled 29.4 billion pieces--up 14.4 percent from the 25.7 billion produced in the corresponding period of 1954.

Output of oriental-type cigarettes in August represented 16.9 percent of total production and this percentage has been relatively constant since last April. Production of filter-type cigarettes continues to rise and accounted for 10.0 percent of total production in August, whereas straight Virginia and dark-type cigarettes represented 1.3 and 2.8 percent, respectively.

Pakistan Lifts Leaf Tobacco Export Ban

The Government of Pakistan has granted permission for the export of domestic-grown tobaccos (all varieties of unmanufactured leaf except Virginia types) through September 1956. The recent devaluation of Pakistan's currency will undoubtedly attract prospective foreign buyers. Also, as an added inducement, exporters are offered 15 percent of the total foreign exchange earned by them in the form of free use for imports. Recently, the Government of Pakistan has also permitted the export of an unspecified amount of Virginia-type tobacco during November and December 1955. However, exporters may encounter difficulty in finding ready buyers for stocks of low-grade flue-cured leaf.

Brazil's Tobacco Exports Up in First Half '55

Exports of Brazilian leaf in the first half of 1955 totaled 17.8 million pounds and were slightly above exports in the same period of 1954. Shipments undoubtedly would have been at a higher level had not indecision been encountered over proposed changes in currency exchange policies, as reported by the Brazilian trade. Leaf tobacco for export was transferred from export category 2 to category 3 on July 26, 1955, thereby increasing cruzeiro return per U. S. dollar. Currently, exporters receive an exchange rate of 43.06 cruzeiros to the dollar (includes the export bonus) as compared with the rate of 35.1 cruzeiros per U. S. dollar for exports of leaf tobacco last year.

BRAZIL: Exports of leaf tobacco during the January-June periods, 1953-55

Country of Destination	: 1953	: 1954	: 1955
	: 1,000	: 1,000	: 1,000
	: <u>pounds</u>	: <u>pounds</u>	: <u>pounds</u>
	:	:	:
German Republic	: 3,999	: 5,454	: 2,504
Austria	: 82	: -	: 181
Denmark	: 835	: 700	: 1,199
Switzerland	: 96	: 775	: 796
Spain	: 1,058	: 4,215	: 2,211
France	: 1,117	: 1,078	: 2,163
Netherlands	: 2,541	: 1,862	: 1,561
Belgium	: 208	: 470	: 910
Sweden	: 1,053	: 359	: -
Algeria	: 274	: 565	: 1,422
Indochina	: 665	: 383	: 93
Morocco	: 501	: 165	: 276
Uruguay	: 1,340	: 1,042	: 414
Others	: 1,181	: 635	: 4,048
	:	:	:
Total	: 14,950	: 17,703	: 17,778
	:	:	:

Source: Estatística Do Comercio Exterior.

Nigerian Tobacco Imports Up 25 Percent

Nigerian imports of unmanufactured tobacco in the first half of 1955 totaled 1.9 million pounds -- up 25 percent from the 1.5 million pounds imported during the corresponding period of 1954.

NIGERIA: Imports of unmanufactured tobacco, with comparisons

Country of Origin	1953	1954	January-June	
			1954	1955
	1,000	1,000	1,000	1,000
	pounds	pounds	pounds	pounds
United States	3,681	4,204	1,463	1,703
Southern Rhodesia	858	2,157	39	-
India	1,125	562	-	203
Others	26	73	22	4
Total	5,690	6,996	1,524	1,910

Takings of United States leaf, principally Black-Fat, flue-cured and One Sucker, were about 16 percent larger than last year. Imports of Black-Fat continue to rise, supplanting takings of One Sucker to a major extent since 1953.

Japanese Sales of "Pearl" Cigarettes Declining

The new brand of cigarettes, "Pearl," has not been received as favorably by consumers as had been expected by the Japanese Tobacco Monopoly Corporation. Sales of "Pearl" have declined about 65 percent since the middle of September when they were first introduced on the market. "Pearl" is the only brand of cigarettes produced by the Monopoly that contains 10 percent United States Burley

The Japanese Tobacco Monopoly Corporation on December 1 increased the blending percentage of United States flue-cured leaf in two brands of cigarettes, "Peace" and "Hikari." For "Peace," the blending percentage of United States flue-cured leaf was increased from 17 to 22 percent and for "Hikari" from 8 to 10 percent. Sales of these two brands of cigarettes combined during October represented about 15 percent of total sales.

Turkey's Leaf Exports to Soviet Bloc Up

Exports of Turkish leaf in the first half of 1955 totaled 57.5 million pounds as compared with 40.5 million pounds during the corresponding period of 1954. Most of the increase occurred in larger shipments to the Soviet "Bloc" countries. Tobacco shipped to the Soviet "Bloc" moves under trade agreements by which Turkey imports products (mainly industrial goods) from these countries. Shipments to the Soviet "Bloc" countries in first 6 months of the last 3 years totaled 3.6, 12.0, and 24.7 million pounds, respectively.

Philippine Flue-cured Crop Forecast Double 1955 Output

A goal of 36 million pounds of flue-cured type tobacco has been set in the Philippine Republic for the crop year ending June 30, 1956. This is more than double the 1955 harvest and, if reached, would make the Republic self-sufficient in flue-cured leaf from the standpoint of quantity. Production of flue-cured-type leaf in 1955 is now placed at 16.8 million pounds, although it is estimated that about 8 percent of this total was sun-cured instead of flue-cured. Flue-cured output in 1954 totaled only 4.5 million pounds. The large increase in 1955 and the continuing expansion in 1956 are the result of import restrictions on flue-cured leaf and high price supports, which guarantee producers a market for their leaf at favorable prices regardless of quality.

Reports indicate that much of the 1955 harvest was of poor quality, as facilities and experience for flue-curing were not adequate for the large crop.

Production of native dark air-cured tobacco in 1955 is estimated at 41.2 million pounds, an increase of about 6 million pounds as compared with the previous year. It is expected that production of this type leaf will decline to slightly less than 40 million in 1956 as producers shift to flue-cured production.

Mexico's Tobacco Imports Down

Mexico's imports of leaf tobacco during the first 9 months of 1955 totaled only 1.6 million pounds -- substantially below the calendar year 1954 imports of 6.5 million pounds. The decline in leaf imports is attributed to increased prices of cigarettes authorized by the Mexican Government in December 1954. Sales of the better quality cigarettes containing United States leaf declined sharply. This has caused the accumulation of leaf stocks and the decline in imports.

Stocks of imported leaf, according to a recent report, are now declining and imports of flue-cured and Burley will be stepped-up in March and June of 1956, respectively. Trade sources indicate that total imports for 1956 may approximate 3.3 million pounds, which will be slightly above the estimated 1955 takings.

Nyasaland's Fire-Cured Crop May be Larger

A substantial increase as compared with the 1955 harvest is expected in Nyasaland's fire-cured tobacco crop for 1956. Reports indicate that the number of growers registered for production of fire-cured leaf this season totals about 60,000. The number of growers last year fell to about 50,000, and this, coupled with adverse weather conditions, caused Nyasaland's fire-cured output to decline to 14.7 million pounds in 1955 as compared with 23.6 million pounds produced in 1954 and a 1947-51 average of 21 million pounds.

The Government has announced a policy of encouraging production of fire-cured leaf in the most suitable areas, and, in order to improve the quality of the product, has limited registrations in marginal areas. The number of growers registered this season is about equal to the number for the 1954 harvest, although somewhat less than the 63,850 registrations for the crop harvested early in 1953. In view of the renewed interest on the part of the Government and growers, the 1956 harvest will probably approach the previous levels.





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UNITED STATES DEPARTMENT OF AGRICULTURE
FOREIGN AGRICULTURAL SERVICE
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MISCELLANEOUS TOBACCO DEVELOPMENTS

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Taiwan Increases Tobacco Production

Tobacco production in Taiwan (Formosa) in 1956 is expected to increase substantially for the second successive year and is forecast at 32.7 million pounds. This is an increase of 27.5 percent as compared with the 1955 crop of 25.6 million and is 53 percent above the 1954 output of 21.3 million pounds. Acreage planted for the 1956 crop, most of which was transplanted in the last three months of calendar year 1955, is estimated at 19,900 acres as compared with 15,400 acres harvested in 1955.

Weather conditions for the 1955 crop were favorable and the quality of the crop was well above average. Approximately one-half of the crop was within the first four grades of leaf, while in the three previous years the percentage in the four upper grades was about one-third of the total.

Output of tobacco products in Taiwan (Formosa) during the first 10 months of 1955 totaled about 19.1 million pounds -- up 12 percent from the 17.1 million pounds produced during the corresponding period of 1954. Output of cigarettes, which account for about 99 percent of total production, has increased approximately 1 billion pieces annually since 1950 and is still not sufficient to meet domestic demand. Production of cigars and pipe tobacco continued upward trends during January-October 1955 from the record lows of 1953 and 1952, respectively.

Dominican Republic Tobacco Exports Up

Exports of Dominican leaf during the first half of 1955 totaled almost 9 million pounds, exceeding the same period last year by 4.6 million. Most of the increase occurred in larger shipments to Spain and France. Exports to Algeria, Indochina, Belgium, and the Netherlands were substantially above the same 6 months of last year; whereas, Uruguay, French Morocco, the Canary Islands, and Western Germany reduced their takings of Dominican leaf.

DOMINICAN REPUBLIC: Exports of leaf tobacco by country of destination, Jan. - June 1955, with comparisons

Country of Destination	1953	1954	January-June	
			1954	1955
	1,000	1,000	1,000	1,000
	pounds	pounds	pounds	pounds
Western Germany	2,956	5,847	817	734
Algeria	2,716	2,853	138	738
Belgium	3,225	4,755	685	775
Spain	112	4,378	-	3,114
France	1,285	2,222	-	1,086
Netherlands	2,440	1,687	482	848
Indochina	3,267	688	131	449
Canary Islands	617	481	432	221
French Morocco	437	1,354	472	-
Uruguay	419	1,091	515	-
Other	3,353	1,831	710	984
Total	20,827	27,187	4,382	8,949

Source: Direccion General de Estadistica

Danish Cigarette Manufacturers Reduce Usings of U. S. Burley

Usings of United States Burley tobacco in blended cigarettes by Danish cigarette manufacturers have been reduced substantially. The blending percentage for Burley has been reduced about one-half from the previous 15 to 18 percent, primarily due to relatively high United States prices for low and medium grades, according to a recent report. Burley leaf is being replaced mainly by United States and Rhodesian flue-cured. The United States share in the total Danish tobacco market, however, is expected to continue at about 50 percent.

German Excise Tax on Smoking Tobacco Reduced

The Federal Republic of Germany has amended the tobacco taxation law to provide for a reduction of 7 to 10 percent in the excise tax rates on smoking tobacco. The excise tax rates for fine-cut and pipe tobacco were reduced from 25 - 47 percent to 16 - 41 percent of the retail price. The retail price of smoking tobacco remains unchanged. This tax reduction

amendment was promulgated by the German Government on November 17, 1955, to become effective December 1, 1955; however, it was made retroactive to October 1, 1955, to refund part of the tax paid by the smoking tobacco industry to compensate for the increased production costs. The refund averages about 5 percent of the retail value of the production during the period April 1, 1954, to September 30, 1955.

The basic reason that made the amendment necessary was the inflexibility of the tobacco pricing and taxation system, which rigidly fixed retail prices and excise rates--while at the same time production costs were mounting.

The reduction in excise rates appeared to offer the best possible solution to the manufacturers' cost-price squeeze.

Argentina's 1956 Tobacco Harvest A Record

Tobacco production for the 1956 harvest in Argentina is expected to set a new record. The 1956 harvest is estimated at 91.0 million pounds from 99,132 acres as compared with the 1955 harvest of 67.0 million pounds from 84,733 acres. Most of the increase occurred in air-cured types produced mainly in the Corrientes district where the 1955 harvest was drastically reduced due to extremely heavy rains. The 1956 flue-cured harvest is estimated at 24.2 million pounds as compared with 19.8 million pounds from the 1955 harvest and may create a surplus problem if favorable weather conditions continue. Plantings of Burley and Kentucky dark fire-cured were about the same as a year ago, whereas the 1956 harvest of the cigar types is anticipated to decline 6 percent.

German Cigar Industry Interested in Homogenized Leaf

The cigar industry in Western Germany has shown keen interest in the developments of homogenized leaf in the United States. The production of homogenized leaf in Germany, according to trade sources, would be too costly because of the high rental demanded for the use of the machinery developed by an American company. However, the industry continues to be interested in the use of homogenized leaf but points out it must be at least competitive with the paper binder that the industry is now using in the production of the low-priced Swiss-type cigars.

During 1955 the West German Tobacco Growers' Association requested the Federal Government to prohibit the use of paper binder in the manufacture of cigars. The Government did not accede to this request since the cigar industry was able to show that the low-priced Swiss-type cigars could not be produced profitably with natural leaf binder. Inadequate production and the low combustibility of domestic binder were other considerations that prevented the prohibition of the use of paper binder. Replacement of natural binder by homogenized leaf on the higher-priced cigars is not likely to occur in the near future.

Burma Increases Tobacco Production

Tobacco production, as estimated by the Agricultural and Rural Development Corporation of Burma, for the 1956 harvest is placed at 107.5 million pounds, from 132,000 acres, as compared with the 1955 harvest of 106.5 million pounds, from 131,700 acres. Flue-cured production is estimated at

1.3 million pounds from 1,800 acres in contrast to the 1955 harvest of .4 million pounds from 600 acres.

The Corporation is actively expanding flue-cured production, even though there is some doubt as to the quality and the suitability of growing flue-cured tobacco in most parts of Burma. Flue-cured production during the first two years of its initiation under the five-year tobacco plantation program has been able to supply about 10 percent of Burma's cigarette tobacco requirements. The goal of the program is to supply Burma's total requirements by 1958. The acreage and production of the native types of tobacco are not expected to change appreciably in the immediate future.

Union of South Africa Needs Large Tobacco Imports

Leaf production in the Union of South Africa for the 1955-56 crop is estimated at 35 million pounds, according to a recent report. Factory usings during 1956 are expected to total about 50 million pounds, leaving a deficiency of about 15 million to be imported. Stocks on January 1, 1956, including the 1954-55 crop, were approximately equal to a 9 months' supply. Of the total deficiency, about 4 million pounds are expected to be imported from the Rhodesias, with the remainder coming from other sources. Imports other than from the Rhodesias will depend upon the actual size of the 1955-56 crop.

Whether the United States will be able to export tobacco to the Union will depend on the availability of supplies from the Central African Federation's 1955-56 crop. The duty on unmanufactured tobacco, exclusive of that imported under special agreements with the Federation, is 3s-6d per pound (about 50 U. S. cents). The present agreement, concluded in mid-1955, permitted the importation into the Union of a record 10 million pounds of Federation leaf tobacco during 1955, duty-free. For each calendar year beginning January 1956, the minimum duty-free imports are to be 2 million pounds with additional quantities permitted following consultations between the two governments. The effect of this duty-free arrangement was to virtually exclude U. S. tobacco from the Union in 1955. Sales amounted to less than 200,000 pounds.

Central African Federation Tobacco Exports Decline

Exports of unmanufactured tobacco from the Federation (the Rhodesias and Nyasaland) in January-October 1955 totaled 114.7 million pounds, 5.7 million pounds less than the corresponding period of 1954. Flue-cured accounted for about 86 percent of total exports, with most of the remainder fire-cured. Total exports of flue-cured increased slightly but shipments of the other types of leaf declined 6.3 million pounds from the same 10-months of last year.

Consignments to the United Kingdom totaled 65.5 million pounds, compared with 72.7 million pounds during the first 10 months of the previous year. Shipments to the Union of South Africa totaled 9.4 million pounds and were over seven times as great as a year earlier.

Shipments to non-commonwealth countries declined about 6.0 million pounds with those to the Netherlands, Belgian Congo, Egypt, Denmark, Sweden, Switzerland and Burma showing the greatest decrease. Western European countries which continue to increase their takings of Federation leaf include the Republic of Germany, Belgium, Norway, Austria, Portugal, Finland, France and Spain.

Aegean Tobacco Market Opens in Turkey

The Aegean tobacco market (unmanipulated 1955 crop) was scheduled to open December 5, but was postponed to January 9. Farm sales of unmanipulated tobacco on the Aegean market during the first three days amounted to 70.1 million pounds, with 34.6 million pounds sold to the Turkish Monopoly, 35.5 million to merchants and none to United States companies. The amount sold in the first three days of sales represents about 45 percent of the 1955 unmanipulated crop. The 1955 crop in the Aegean area is estimated at about 150 million pounds or about 25 percent above that of last year.

Prices ranged from 38 to 56 U. S. cents per pound averaging about 2 U. S. cents above last year. Quality of the 1955 crop was spotty, according to trade sources, and the buyers will have to exercise great care this year in order to obtain their requirements of the better grades. Rains late in the growing season caused damage to the crop and the leaf shows more than normal insect damage.

The Minister of Customs and Monopolies issued a public statement on January 4, in connection with the scheduled opening of the Aegean market on January 9, announcing the Government's decision to pay growers a subsidy of about 4 U. S. cents per pound for the entire 1955 Turkish tobacco crop. The prime objective of this subsidy was to lend support for the orderly marketing of the 1955 crop and perhaps limit the increase in price of leaf for export.

The Turkish Government now requires a certification from purchasers of Turkish leaf tobacco guaranteeing non-reexportation from the country of initial destination.

Exports of Turkish leaf are being boosted by bilateral trade agreements, principally with the Soviet "Bloc" countries. During the last half of 1955 sales to East Germany totaled 11.8 million pounds, to Czechoslovakia and Poland 8.8 million each and to Hungary 1.3 million. In the near future, trade delegations from the Soviet Union and Czechoslovakia are expected to negotiate agreements with Turkey covering the importation of tobacco from the 1955 crop. These arrangements are expected to include the sale of 13.2 million pounds to the Soviet Union and 4.4 million pounds to Czechoslovakia. The sale of \$200,000 worth of tobacco to Japan and 4.0 million pounds to Yugoslavia were also concluded through trade arrangements.

Currently, United States companies are paying about 65 to 70 U. S. cents per pound for manipulated Turkish tobacco from the 1954 crop as compared with a price of 63 - 67 cents for the 1953 crop. Sales of the 1954 manipulated crop to American concerns continues to lag because of the high

price of Turkish leaf. It is reported that Turkish merchants estimate that due to increased labor and other costs, manipulation of the 1955 crop will probably run about 6 U. S. cents per pound more than for the 1954 crop.

Australian Output of Tobacco Products Continues Rise

Australian output of tobacco products during fiscal 1954-55 is estimated at 43.6 million pounds, which would be almost double that of prewar. Cigarette output, however, has more than tripled prewar production and now comprises 51.3 percent of total production in contrast to 28.0 percent during 1935-39. Production of smoking tobacco and tobacco for roll-your-own cigarettes continued an upward trend through fiscal 1953-54, but declined 10 percent during fiscal 1954-55, when larger cigarette supplies became available. Prior to fiscal 1954-55, the output of smoking tobacco exceeded cigarette output. Output of cigars is increasing from the 1952-53 low, but is still below the immediate post-war and prewar annual averages.

AUSTRALIA: Output of tobacco products, with comparisons

Fiscal year beginning April 1	: Cigarettes	: Cigars	: Smoking tobacco 1/	: Total
	: 1,000	: 1,000	: 1,000	: 1,000
	: <u>pounds</u>	: <u>pounds</u>	: <u>pounds</u>	: <u>pounds</u>
	:	:	:	:
1935-39 Av.	: 6,260	: 249	: 15,829	: 22,338
1947-51 Av.	: 10,190	: 164	: 20,061	: 30,415
1952	: 13,879	: 129	: 22,334	: 36,342
1953	: 18,303	: 143	: 23,400	: 41,846
1954 <u>2/</u>	: 22,379	: 150	: 21,060	: 43,589
	:	:	:	:

1/ Includes chewing tobacco and snuff.

2/ Preliminary

Philippine Tobacco Duties Increased 30 Percent

The basic import duty on a vast number of commodities, including tobacco was increased by 30 percent for a 3 -year period by Philippine Republic Executive Order 150, effective January 1, 1956. Import duties for stemmed and unstemmed leaf tobacco now amount to about 81 and 60 U. S. cents per pound, respectively. The 30-percent increase also applies to manufactured tobacco products.



FOREIGN AGRICULTURE CIRCULAR

UNITED STATES DEPARTMENT OF AGRICULTURE
FOREIGN AGRICULTURAL SERVICE
WASHINGTON, D. C.

FT 3-56

February 17, 1956

SALE OF TOBACCO UNDER TITLE I OF PUBLIC LAW 480 AS OF DECEMBER 31, 1955

This circular gives a summary of the programs for the sale of tobacco under Title I of Public Law 480 for the 18 month period ending December 31, 1955. During this period 14 agreements were signed providing for the sale of about 40 million dollars worth of U. S. tobacco (about 56 million pounds). The market value and the estimated weight of the tobacco included in all agreements signed as of December 31, 1955 are shown in Table 1. 1/

A total of four agreements were signed during the period July-December 1955, providing for the sale of about 1.5 million pounds of tobacco. Agreements with several other countries are expected to be concluded prior to the end of fiscal year 1956. It is not possible to accurately estimate the size of fiscal year 1956 P.L. 480 programs; however, it now appears that they may exceed the fiscal year 1955 programs.

1/ Since December 31, 1955, two agreements have been signed providing for the sale of tobacco under Public Law 480. On February 7, 1956 an agreement was signed with Austria providing for the sale of \$3 million worth of tobacco (about 5 million pounds) and on February 8, 1956 an agreement was signed with Burma providing for the sale of \$1.1 million worth of tobacco (about 1.5 million pounds).

Table I. Agreements Signed Under Title I of
Public Law 480 Providing for the Sale of
U. S. Tobacco as of December 31, 1955

<u>Country</u>	<u>Estimated Million Pounds</u>	<u>Million Dollars</u>
Fiscal Year 1954-55 Programs:		
Pakistan	3.60	3.00
United Kingdom	22.00	15.00
Japan	6.20	5.12
Spain ^{1/}	4.60	2.30
Finland	3.80	2.20
Thailand	2.60	2.00
Italy	4.20	3.20
Austria	.90	.50
Korea ^{2/}	6.00	4.62
Israel	<u>.25</u>	<u>.20</u>
Total	54.15	38.14
Fiscal Year 1955-56 Programs:		
France	.87	.65
Brazil	.10	.25
Ecuador	.32	.20
Israel	<u>.25</u>	<u>.20</u>
Total	1.54	1.30
Grand Total	55.67	39.44

^{1/} The original Spanish agreement included 9.0 million pounds of tobacco at 4.5 million dollars but this was amended.

^{2/} The original poundage estimate for Korea was 10 million but this was revised when the Koreans indicated need for more expensive leaf for blending.

During the past six months the Act was amended by Public Law 387, 84th Congress, first session, to change the authorized amount under Title I from \$700 million to \$1,500 million. This amendment should substantially increase the quantity of tobacco that will be sold under provisions of P.L. 480 during fiscal years 1956 and 1957.

The remainder of the tobacco for which agreements were signed as of December 31, 1955 and which has not yet been shipped is shown in the following table:

Country	Value		Purchase Authorizations		
	: Million	: Dollars	: Number	: Ending Contracting Period	: Ending Shipping Period
Fiscal Year 1954-55	:	:	:	:	:
Programs:	:	:	:	:	:
Pakistan	: .12	:	: 15-01	: Dec. 31, 1955	: Sept. 30, 1956
	: .29	:	: 15-15	: May 31, 1956	: Sept. 30, 1956
	: 1.72	:	: 15-14	: Dec. 31, 1955	: Sept. 30, 1956
Spain	: 1.22	:	: 17-04	: Nov. 30, 1955	: Feb. 29, 1956
	: 1.11	:	: 17-05	: Mar. 31, 1956	: June 30, 1956
Italy	: .43	:	: 20-01	: Dec. 31, 1955	: March 31, 1956
Korea	: 4.62	:	: 24-02	: Feb. 29, 1956	: April 30, 1956
Fiscal Year 1955-56	:	:	:	:	:
Programs:	:	:	:	:	:
Brazil	: .25	:	: 1/	:	:
Ecuador	: .20	:	: 29-03	: May 15, 1956	: June 15, 1956
Israel	: .20	:	: 16-18	: May 31, 1956	: June 30, 1956
	:	:	:	:	:

1/ This purchase authorization is expected to be issued in the near future.

The percentage of each type of tobacco shipped under P.L. 480 as of December 31, 1955 compared with total shipments during previous selected periods was as follows:

	Type					
	: Flue-cured	: Burley	: Dark-Fired Ky.-Tenn.	: Dark-Fired Va.	: All Cigar	: All Other
	:	:	:	:	:	:
	(Percentage)					
P.L. 480 as of	:	:	:	:	:	:
Dec. 31, 1955	: 83.3	: 9.4	: 6.4	: .6	: .3	: -
1935-39 Average	: 74.4	: 2.5	: 11.6	: 2.2	: .3	: 9.0
1947-51 Average	: 79.8	: 6.7	: 5.1	: 1.2	: 2.0	: 5.2
1953-54 Average	: 84.3	: 5.6	: 4.2	: .8	: 1.3	: 3.8
	:	:	:	:	:	:

Shipments of tobacco under fiscal year 1955 P.L. 480 programs, as of December 31, 1955, have totaled about 40 million pounds, which is about 75 percent of the tobacco covered by agreements signed in the first year of the program. In addition to these shipments, about 870,000 pounds of tobacco were shipped to France under a fiscal year 1956 program prior to December 31, 1955. Table 2 indicates United States exports of unmanufactured tobacco under P.L. 480 by types and country of destination, fiscal year 1955 and fiscal year 1956 programs, as of December 31, 1955.

The United States has obtained appropriate assurances from foreign governments that sale of tobacco for foreign currencies will be in addition to usual marketings. P.L. 480 also provides that sales under the program should not be unduly disruptive to world market prices.

Examples of significant developments under P.L. 480 in calendar 1955 are as follows: (1) The agreement with Korea represents a new postwar market for U. S. tobacco; (2) arrangements have been made to ship cut tobacco in bulk under P.L. 480 which will enable us to expand consumption of our tobacco in countries such as Ecuador; (3) a special credit arrangement with the U. K., which permitted purchase of tobacco during the season and shipment later under P.L. 480, helped boost the auction markets during sale of the 1954 crop; (4) total exports of U. S. tobacco in calendar 1955 exceeded the previous year by about 15% largely due to sales under P.L. 480; and (5) sales under P.L. 480 have enabled several countries to introduce new brands of American-type cigarettes.

In most of the countries which have purchased tobacco under P.L. 480, the Tobacco Division plans to develop projects which will help increase the consumption of U. S. tobacco in these countries. These projects will be financed by use of local currencies accruing from P.L. 480 sales together with contributions from the U. S. and foreign tobacco trade groups. To help develop new markets for U. S. tobacco, some of the following projects will be undertaken:

- (a) Help advertise and expand the consumption of tobacco products which use a high percentage of U. S. leaf.
- (b) Pay expenses of foreign tobacco officials for travel to the U. S. to learn more about processing, manufacturing and distribution.
- (c) Help build pilot plants for improvement of storage or processing of U. S. tobacco.
- (d) Participation in trade fairs.
- (e) Pay for research studies such as a market analysis survey, a consumer preference study and a study of the effect of taxation and retail price of tobacco products on consumption and government revenue.

Table 2. United States Exports of Unmanufactured Tobacco Under P.L. 480 by Types and Country of Destination, Fiscal Year 1955 and Fiscal Year 1956, as of December 31, 1955*

(Declared Weight)

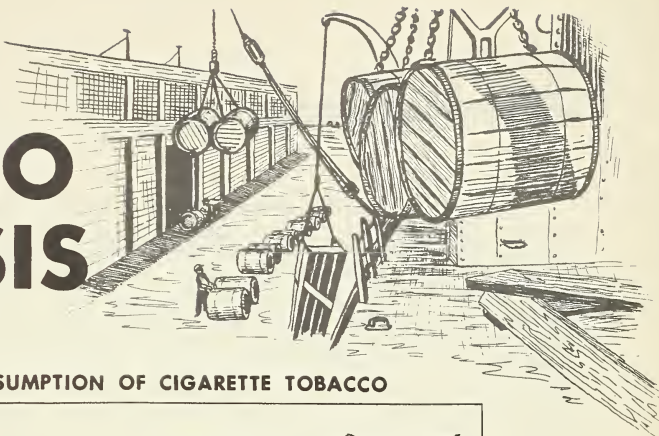
Country	T y p e										Total
	Flue-Cured		Burley		Dark-Fired : Ky.-Tenn.		Dark-Fired : Virginia		All Cigar		
	<u>Lbs.</u>	<u>\$</u>	<u>Lbs.</u>	<u>\$</u>	<u>Lbs.</u>	<u>\$</u>	<u>Lbs.</u>	<u>\$</u>	<u>Lbs.</u>	<u>\$</u>	
Fiscal Year 1955 Programs:											
Pakistan	1,602	1,337									1,602 1,337
United Kingdom	21,412	14,999									21,412 14,999
Japan	4,967	3,958	1,736	1,175							6,703 5,133
Spain											
Finland	2,897	1,801	705	309	105	38	70	31			3,777 2,179
Thailand	2,621	2,001									2,621 2,001
Italy			1,150	867	2,481	1,908					3,631 2,775
Austria			333	124	90	73	162	128	128	174	713 499
Korea											
Israel	309	202									309 202
Fiscal Year 1956 Programs:											
France	870	650									870 650
Total	34,678	24,948	3,924	2,475	2,676	2,019	232	159	128	174	41,638 29,775

* Latest available information.

A contract has been signed between FAS and the U. S. tobacco trade which provides for the U. S. trade to contribute \$30,000 and the FAS to furnish \$600,000 worth of local currency for tobacco market development projects during the next two years. Projects which we hope to get under way in the near future include (1) visit of Thailand Tobacco Monopoly officials to the U. S., (2) an extensive promotional project in Japan for advertising tobacco products containing U. S. tobacco, and (3) a market analysis survey to be conducted in Spain by two agricultural economists from one of the land grant colleges.

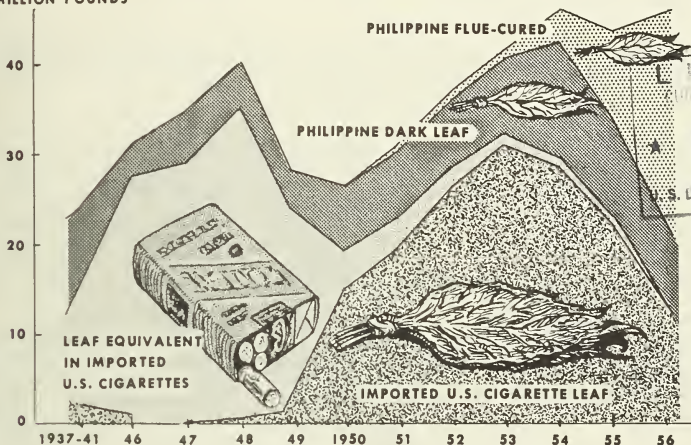
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WORLD TOBACCO ANALYSIS



PHILIPPINE CONSUMPTION OF CIGARETTE TOBACCO

MILLION POUNDS



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U.S. DEPARTMENT OF AGRICULTURE

THE LIFE CYCLE OF A MARKET: The historical pattern of world tobacco trade has not been static. Sources of, and markets for, leaf have continually shifted in volume. Leaf tobacco has had, however, a relatively stable export movement compared with other commodities. The Philippine market has been an exception. Beginning with a big demand for U.S. manufactured tobacco in the form of cigarettes, this country passed quickly to the position of being the fifth largest market for U.S. tobacco in the form of leaf, and is now fast becoming a producer of leaf in a surplus situation. (1956 data estimated).

Circular FT-4

March 1956

UNITED STATES DEPARTMENT of AGRICULTURE
Foreign Agricultural Service Washington, D.C.

World Summary

Production: World production of tobacco in 1955 totaled 8.1 billion pounds. This was 2.3 percent higher than 1954 and 12.7 percent greater than the 1947-51 average. Most of the increase in production occurred in Asia, while North and South America, Africa and Oceania showed slight decreases. World production of flue-cured -- the principal type entering world trade -- increased 223 million pounds with larger supplies available in the United States and Asia. Production of this type outside of the United States has increased from 30 percent of the market in 1935-39 to 45 percent today. Flue-cured, Burley and oriental, the principal cigarette types, account for more than 50 percent of the world production in contrast to about 33 percent prewar.

Stocks: Total world stocks of tobacco have increased during 1955. Most important importing countries have adequate stocks. Many of the larger producing countries are in a surplus position.

Consumption: World tobacco consumption continued its upward trend in 1955. Big gains occurred in countries recovering from the war such as Korea, China, Germany and, apparently, Russia. Moderate increases were registered in many other important consuming countries including the United States. Cigarette smoking was the cause of all the increase as other tobacco products declined in sales. Continued improved economic conditions and population increases account for the upward consumption levels.

Outlook: Domestic production of leaf will continue to increase in many important importing countries such as Germany, Australia, and particularly, the Philippines. Production in the United States will be down due to operation of the price support, acreage quota system. Other important producing countries such as Turkey, Greece, Southern Rhodesia, Canada and China will likely maintain or increase production.

United States Exports: The United States exports face an increasingly competitive market due to: (1) increased production of cigarette tobaccos in the world; (2) increased prices in the lower grades of American grown flue-cured and Burley tobaccos; and (3) additional trade barriers, such as bilateral agreements, as a result of the need of foreign countries to dispose of manufactured products. Despite the assistance of special programs such as P. L. 480, exports might decline slightly in 1956. The U. S. share of world flue-cured exports in recent years has been between 60 and 70 percent compared with 85 percent prewar. Consumption of United States leaf in Western Europe has been declining slightly due to the stepped up domestic production and larger takings of other foreign leaf through various trade and purchase arrangements.

Production

TOBACCO FOR HARVEST, FIRST HALF, CALENDAR YEAR 1956

Production of leaf tobacco for harvest in the first half of 1956, principally in the Southern Hemisphere, is forecast at 2,300 million pounds. This is an increase of 8.6 percent above 1955 and 28.4 percent above the 1947-51 average.

Only the production for harvest in the first half of calendar year 1956 is included in this forecast. In several countries tobacco is harvested in both 6-month periods of the year. Production in such countries is included in this forecast if most of the crop is harvested in the first half of the year 1/.

Major increases in production are expected in Costa Rica, Argentina, Southern Rhodesia, Union of South Africa, Indonesia, India, and the Philippine Republic. These increases more than offset small decreases in Mexico, Cuba, Dominican Republic and Puerto Rico. Flue-cured production is expected to reach 560 million pounds, a 22.1 percent increase over 1955 and double the 1947-51 average.

North America, Including the Caribbean Area

Production of tobacco in the first half of 1956 is forecast at 269.4 million pounds - a decrease of 8 percent - the only major area expecting a decline. Costa Rica will more than double production, but Mexico, Cuba, Dominican Republic, and Puerto Rico expect substantially smaller crops.

South America

South American production is forecast at 510 million pounds in 1956, an increase of 6.5 percent over 1955. A much larger crop is expected in Argentina where weather damaged the 1955 crop. Increases are also forecast for Brazil and Colombia with a small decline in Venezuela.

Africa

Leaf tobacco for harvest in Africa in the first half of calendar year 1956 is forecast at 262.9 million pounds, 13.3 percent above the 1955 harvest and 26.0 percent above the 1947-51 average. Flue-cured production in Southern Rhodesia is forecast at about 145 million pounds, an increase of 25 million pounds over the 1955 crop. The Union of South African flue-cured crop is

1/ Included in this category are Colombia, Madagascar, Ceylon, Pakistan, Indonesia, and Thailand.

expected to increase from 12.3 million pounds in 1955, when the crop was damaged by unfavorable weather, to 16.5 million pounds in 1956.

Asia

Production in Asia for harvest in the first half of 1956 is forecast at 1,243.3 million pounds, or about 12.7 percent above the 1955 harvest and about one-third more than was produced in 1947-51. Large increases are expected in Pakistan, India, Indonesia and the Philippine Republic.

Oceania

Production for harvest in the first half of 1956 is expected to reach 14.3 million pounds compared with 11.2 million in 1955. Slight increases are forecast for both Australia and New Zealand.

FORECAST OF PRODUCTION BY KIND

Flue-cured

Production of flue-cured in the first half of 1956 is estimated at about 560 million pounds, an all-time high, and approximately 22.1 percent above the 458 million pounds in 1955. The largest estimated increases are for Southern and Northern Rhodesia, Philippine Republic, Brazil, Indonesia, India, Argentina, and Nigeria. All other areas, except Mexico, Venezuela, and Thailand expect to harvest larger crops this year.

LEAF TOBACCO: Estimated production by kind harvested in the first half of calendar year 1956, with comparisons - - farm sales weight 1/

Kinds	:	1935-39	:	1947-51	:	1955	:	1956 2/
	:	1,000	:	1,000	:	1,000	:	1,000
	:	<u>pounds</u>	:	<u>pounds</u>	:	<u>pounds</u>	:	<u>pounds</u>
	:	:	:	:	:	:	:	:
Flue-cured	:	89,110	:	279,555	:	458,523	:	559,885
Burley	:	409	:	9,207	:	14,929	:	15,797
Other light air-cured	:	23,690	:	24,342	:	36,607	:	35,316
Dark air-cured	:	1,709,987	:	1,110,866	:	1,068,275	:	1,152,730
Light sun-cured	:	130,384	:	133,084	:	157,280	:	156,220
Dark sun-cured	:	155,564	:	201,580	:	347,931	:	343,639
Fire-cured	:	18,541	:	29,775	:	22,754	:	21,205
Oriental	:	1,455	:	2,746	:	12,103	:	15,542
Total	:	2,129,140	:	1,791,155	:	2,118,402	:	2,300,334

1/ Farm sales weight is about 10 percent above the dry weight normally reported in manufacturing and export statistics.

2/ Preliminary.

Burley

Production of Burley in these areas is estimated at 15.8 million pounds, an increase of about 870,000 pounds. This is chiefly due to expanded output in South America, where larger crops are expected in Brazil, Venezuela, and Chile.

Other Light Air-cured

Production of other light air-cured, which includes all light air-cured except Burley, is forecast at 35.3 million pounds. This is a decrease of 3.5 percent due primarily to expected declines in the Union of South Africa and Argentina.

Dark Air-cured

Estimated output at almost 1,153 million pounds is a sharp increase of 8.0 percent above 1955, and 3.8 percent greater than the 1947-51 average. The largest increases as compared to last year are expected in Indonesia (where the crop in 1955 was reduced greatly due to floods), Argentina, and India, which more than offset the most important declines in the Dominican Republic and Brazil.

Light Sun-cured

Estimated production of light sun-cured at 156.2 million is about the same as last year (157.3 million pounds). Increases in India, Philippine Republic, Pakistan and Paraguay are more than offset by an expected decrease of 15 percent in Mexico.

Dark Sun-cured

Production of dark sun-cured for harvest in the first half of 1956 is estimated at 343.6 million pounds, a decline of 1.2 percent from 1955. This is due almost entirely to the large decrease anticipated in Cuba - - chiefly Remedios and Vuelta Abajo. Output is expected to be about double 1955 in Costa Rica, and slightly above last year in Pakistan and Burma.

Fire-cured

Output of fire-cured is estimated at 21.2 million pounds compared to 22.8 last year - - a decline of 7 percent. Most of the decrease is expected in Nyasaland with smaller declines also for Uganda, Southern Rhodesia, and Tanganyika.

Oriental

Production of oriental is estimated at 15.5 million pounds - - a very large increase of 28 percent above 1955 and more than five times the 1947-51 average. Most of the expected increase is due to a 30 percent increase in the estimate for Pakistan, with less important rises anticipated in Argentina and the Union of South Africa.

TOBACCO: Estimated acreage, yield and production in specified countries harvested in first half of calendar year 1956 with comparisons, farm sales weight 1/

Continent and Country	Acreage Harvested				Yield Per Acre				Production			
	Average		1956 2/		Average		1956 2/		Average		1956 2/	
	1935-39	1947-51	1955	1956 2/	1935-39	1947-51	1955	1956 2/	1935-39	1947-51	1955	1956 2/
	acres	acres	acres	acres	pounds	pounds	pounds	pounds	pounds	pounds	pounds	pounds
NORTH AMERICA:												
Costa Rica	2/	4	11	21	3/	700	675	725	750	2,522	7,152	15,390
El Salvador	1	5	4	4	650	467	477	480	4/	1,462	1,832	1,920
Guatemala	5	7	9	10	550	576	436	436	4/	1,462	1,832	1,920
Honduras	4/	11	9	10	4/	844	436	457	4/	7,912	7,111	4,120
Nicaragua	51	90	95	87	790	882	880	871	38,200	79,425	83,775	76,059
Panama	1	2	3	3	900	775	890	850	800	1,150	2,800	2,660
Cuba	3/	2	2	2	3/	450	450	450	3/	72,751	109,225	94,719
Dominican Republic	108	132	153	128	429	550	712	737	48,092	47,178	42,000	33,600
Haiti	25	45	52	50	985	1,050	808	672	24,625	7,500	1,500	1,500
Jamaica	3/	3/	9	9	3/	370	375	375	3/	2,219	750	750
Puerto Rico	44	35	37	35	673	769	919	939	29,393	26,921	34,010	32,950
Total North America	242	337	384	358	-	-	-	-	148,252	253,489	292,329	289,438
SOUTH AMERICA:												
Argentina	29	67	84	95	965	926	790	951	27,983	61,140	66,947	90,988
Bolivia	3	3	3	3	700	700	700	3	2,500	2,100	2,100	2,100
Brazil	250	337	451	457	811	692	690	690	202,703	233,120	311,400	315,258
Chile	9	9	7	8	1,846	1,670	1,530	1,918	16,618	14,719	13,462	15,179
Colombia	37	47	54	57	803	958	973	973	31,097	19,138	19,812	20,000
Ecuador	2	16	21	21	808	1,560	974	1,364	1,254	1,057	973	1,098
Paraguay	1	1	1	1	86	86	1,770	1,364	7,700	6,224	11,629	10,243
Venezuela	10	8	14	8	825	626	830	1,280	308,247	381,725	479,426	510,381
Total South America	361	488	635	650	-	-	-	-	-	-	-	-

AFRICA:		1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	32	33	34	35	36	37	38	39	40	41	42	43	44	45	46	47	48	49	50	51	52	53	54	55	56	57	58	59	60	61	62	63	64	65	66	67	68	69	70	71	72	73	74	75	76	77	78	79	80	81	82	83	84	85	86	87	88	89	90	91	92	93	94	95	96	97	98	99	100	101	102	103	104	105	106	107	108	109	110	111	112	113	114	115	116	117	118	119	120	121	122	123	124	125	126	127	128	129	130	131	132	133	134	135	136	137	138	139	140	141	142	143	144	145	146	147	148	149	150	151	152	153	154	155	156	157	158	159	160	161	162	163	164	165	166	167	168	169	170	171	172	173	174	175	176	177	178	179	180	181	182	183	184	185	186	187	188	189	190	191	192	193	194	195	196	197	198	199	200	201	202	203	204	205	206	207	208	209	210	211	212	213	214	215	216	217	218	219	220	221	222	223	224	225	226	227	228	229	230	231	232	233	234	235	236	237	238	239	240	241	242	243	244	245	246	247	248	249	250	251	252	253	254	255	256	257	258	259	260	261	262	263	264	265	266	267	268	269	270	271	272	273	274	275	276	277	278	279	280	281	282	283	284	285	286	287	288	289	290	291	292	293	294	295	296	297	298	299	300	301	302	303	304	305	306	307	308	309	310	311	312	313	314	315	316	317	318	319	320	321	322	323	324	325	326	327	328	329	330	331	332	333	334	335	336	337	338	339	340	341	342	343	344	345	346	347	348	349	350	351	352	353	354	355	356	357	358	359	360	361	362	363	364	365	366	367	368	369	370	371	372	373	374	375	376	377	378	379	380	381	382	383	384	385	386	387	388	389	390	391	392	393	394	395	396	397	398	399	400	401	402	403	404	405	406	407	408	409	410	411	412	413	414	415	416	417	418	419	420	421	422	423	424	425	426	427	428	429	430	431	432	433	434	435	436	437	438	439	440	441	442	443	444	445	446	447	448	449	450	451	452	453	454	455	456	457	458	459	460	461	462	463	464	465	466	467	468	469	470	471	472	473	474	475	476	477	478	479	480	481	482	483	484	485	486	487	488	489	490	491	492	493	494	495	496	497	498	499	500	501	502	503	504	505	506	507	508	509	510	511	512	513	514	515	516	517	518	519	520	521	522	523	524	525	526	527	528	529	530	531	532	533	534	535	536	537	538	539	540	541	542	543	544	545	546	547	548	549	550	551	552	553	554	555	556	557	558	559	560	561	562	563	564	565	566	567	568	569	570	571	572	573	574	575	576	577	578	579	580	581	582	583	584	585	586	587	588	589	590	591	592	593	594	595	596	597	598	599	600	601	602	603	604	605	606	607	608	609	610	611	612	613	614	615	616	617	618	619	620	621	622	623	624	625	626	627	628	629	630	631	632	633	634	635	636	637	638	639	640	641	642	643	644	645	646	647	648	649	650	651	652	653	654	655	656	657	658	659	660	661	662	663	664	665	666	667	668	669	670	671	672	673	674	675	676	677	678	679	680	681	682	683	684	685	686	687	688	689	690	691	692	693	694	695	696	697	698	699	700	701	702	703	704	705	706	707	708	709	710	711	712	713	714	715	716	717	718	719	720	721	722	723	724	725	726	727	728	729	730	731	732	733	734	735	736	737	738	739	740	741	742	743	744	745	746	747	748	749	750	751	752	753	754	755	756	757	758	759	760	761	762	763	764	765	766	767	768	769	770	771	772	773	774	775	776	777	778	779	780	781	782	783	784	785	786	787	788	789	790	791	792	793	794	795	796	797	798	799	800	801	802	803	804	805	806	807	808	809	810	811	812	813	814	815	816	817	818	819	820	821	822	823	824	825	826	827	828	829	830	831	832	833	834	835	836	837	838	839	840	841	842	843	844	845	846	847	848	849	850	851	852	853	854	855	856	857	858	859	860	861	862	863	864	865	866	867	868	869	870	871	872	873	874	875	876	877	878	879	880	881	882	883	884	885	886	887	888	889	890	891	892	893	894	895	896	897	898	899	900	901	902	903	904	905	906	907	908	909	910	911	912	913	914	915	916	917	918	919	920	921	922	923	924	925	926	927	928	929	930	931	932	933	934	935	936	937	938	939	940	941	942	943	944	945	946	947	948	949	950	951	952	953	954	955	956	957	958	959	960	961	962	963	964	965	966	967	968	969	970	971	972	973	974	975	976	977	978	979	980	981	982	983	984	985	986	987	988	989	990	991	992	993	994	995	996	997	998	999	1000	1001	1002	1003	1004	1005	1006	1007	1008	1009	1010	1011	1012	1013	1014	1015	1016	1017	1018	1019	1020	1021	1022	1023	1024	1025	1026	1027	1028	1029	1030	1031	1032	1033	1034	1035	1036	1037	1038	1039	1040	1041	1042	1043	1044	1045	1046	1047	1048	1049	1050	1051	1052	1053	1054	1055	1056	1057	1058	1059	1060	1061	1062	1063	1064	1065	1066	1067	1068	1069	1070	1071	1072	1073	1074	1075	1076	1077	1078	1079	1080	1081	1082	1083	1084	1085	1086	1087	1088	1089	1090	1091	1092	1093	1094	1095	1096	1097	1098	1099	1100	1101	1102	1103	1104	1105	1106	1107	1108	1109	1110	1111	1112	1113	1114	1115	1116	1117	1118	1119	1120	1121	1122	1123	1124	1125	1126	1127	1128	1129	1130	1131	1132	1133	1134	1135	1136	1137	1138	1139	1140	1141	1142	1143	1144	1145	1146	1147	1148	1149	1150	1151	1152	1153	1154	1155	1156	1157	1158	1159	1160	1161	1162	1163	1164	1165	1166	1167	1168	1169	1170	1171	1172	1173	1174	1175	1176	1177	1178	1179	1180	1181	1182	1183	1184	1185	1186	1187	1188	1189	1190	1191	1192	1193	1194	1195	1196	1197	1198	1199	1200	1201	1202	1203	1204	1205	1206	1207	1208	1209	1210	1211	1212	1213	1214	1215	1216	1217	1218	1219	122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Continent and Country	Acreage Harvested				Yield Per Acre				Production			
	Average		1956 2/		Average		1956 2/		Average		1956 2/	
	1,000	acres	1,000	acres	1935-39	1947-51	1935-39	1947-51	1935-39	1947-51	1935-39	1947-51
NORTH AMERICA:												
Costa Rica	3/	4/	4/	3/	3/	5/	500	700	3/	5/	41	150
El Salvador	4/	2/	3/	3/	320	345	416	416	—	—	671	1,250
Guatemala	4/	1/	4/	4/	530	580	958	965	132	476	431	470
Honduras	3/	4/	4/	4/	3/	405	600	615	—	—	120	170
Mexico	1	4	5	4	720	850	977	1,000	700	3,579	5,071	4,409
Nicaragua	—	1	1	1	—	900	1,000	1,000	—	—	1,200	1,200
Caribbean:												
Jamaica	3/	2/	3/	3/	2/	2/	2/	2/	2/	3/	50	50
SOUTH AMERICA:												
Argentina	1	9	17	21	1,000	887	1,147	1,149	599	7,983	19,841	24,251
Brazil	10	35	51	57	1,200	1,299	1,080	1,160	12,549	45,498	55,115	66,128
Chile	4/	4/	1	1	—	1,464	1,255	1,418	203	478	639	827
Venezuela	3	3	10	4	—	881	850	1,431	—	2,472	8,102	6,504
AFRICA:												
Kenya	3/	2/	3/	2/	—	2/	2/	2/	2,267	340	220	270
Nyasaland	2/	5/	7/	7/	2/	599	380	492	—	2,697	2,660	3,200
Tanganyika	3/	2/	2/	2/	2/	450	440	440	6	1,992	3,235	3,400
Uganda	2	2	2	2	1,200	1,233	1,343	1,464	430	514	880	930
Mauritius	1	1	1	1	—	—	383	400	—	1,150	654	553
Mozambique	3	3	4	5	—	—	430	460	—	—	2,500	2,500
Nigeria	4	1	6	7	—	400	430	430	—	230	2,500	3,000
Northern Rhodesia	4	13	13	15	400	460	585	621	1,500	5,986	7,606	8,000
Southern Rhodesia	46	130	170	192	509	634	709	700	24,623	82,362	120,558	144,300
Union of South Africa:												
Asiatic	3/	3/	3/	2/	2/	2/	—	2/	2,715	21,425	12,300	16,500
Orinoco	—	—	—	—	—	—	—	—	—	410	—	—
ASIA:												
Armenia	—	4/	1	2	—	780	718	722	—	88	430	1,299
Ceylon	—	—	6	7	—	475	500	514	—	950	3,400	3,600
Philippines	—	5/	10	12	—	785	800	833	—	5/	8,000	10,000
India	60	120	178	185	440	538	649	676	26,900	64,510	119,000	125,000
Indochina	—	1	1	1	—	550	500	600	—	—	500	600
Indonesia, Republic of	12	5/	25	40	400	500	400	625	4,800	5/	9,520	25,000
Philippines, Republic of	1	4/	27	74	550	525	513	513	342	13,852	38,000	38,000
Thailand	3	2/	59	59	280	300	376	375	900	8,200	22,071	22,000
Taiwan	3	14	15	20	1,200	965	1,694	1,500	3,751	13,740	29,817	30,000
OCEANIA:												
Australia	10	5	9	10	532	789	740	700	5,276	3,629	7,020	10,000
New Zealand	2	4	3	3	683	1,206	1,350	1,404	1,367	4,645	6,052	6,214
TOTAL COUNTRIES SHOWN												

See footnotes at end of tables.

HINLEY TURBACCO: Estimated average, yield and production in specified countries, harvested in first half of calendar year 1956, with comparisons, farm sales weight $\frac{1}{2}$

Continent and Country	Average Harvested				Yield Per Acre				Production			
	1955		1956 $\frac{1}{2}$		1955		1956 $\frac{1}{2}$		1955		1956 $\frac{1}{2}$	
	Average 1,000 BAGS	1955-56 1,000 BAGS	Average 1,000 BAGS	1955-56 1,000 BAGS	Average 1,000 BAGS	1955-56 1,000 BAGS	Average 1,000 BAGS	1955-56 1,000 BAGS	Average 1,000 BAGS	1955-56 1,000 BAGS	Average 1,000 BAGS	1955-56 1,000 BAGS
NORTH AMERICA:												
Canada (incl.)	-	-	4 1/2	-	-	-	-	-	-	-	-	-
El Salvador	-	-	4 1/2	-	-	-	1,170	1,500	-	-	-	2
Guatemala	-	-	4 1/2	-	-	-	700	1,000	-	-	-	105
Honduras	-	-	4 1/2	-	-	-	1,340	991	300	1,700	1,443	1,323
Nicaragua	-	-	4 1/2	-	-	-	700	800	-	-	50	150
SOUTH AMERICA:												
Brazil	4 1/2	3	3	638	500	496	391	99	496	1,332	1,488	1,968
Chile	-	4	4	-	1,200	910	992	-	2,000	3,638	3,968	4,200
Venezuela	-	4 1/2	4 1/2	-	1,400	1,400	1,400	-	1,400	1,400	1,400	1,400
AFRICA:												
Nyasaland	-	2 1/2	3	-	476	672	672	-	1,025	2,000	2,000	1,800
Union of South Africa	-	2 1/2	3 1/2	-	733	733	500	10	205	200	300	300
ASIA:												
India	-	3	4	-	500	611	625	-	1,640	2,200	2,330	2,330
OCEANIA:												
New Zealand	-	4 1/2	4 1/2	-	1,200	1,200	1,200	-	100	83	86	86
TOTAL COUNTRIES SHOWN									409	9,207	14,929	15,427

See footnotes at end of tables.

OTHER LIGHT AIR-CURED TURBACCO: Estimated average, yield and production in specified countries, harvested in first half of calendar year 1956, with comparisons, farm sales weight $\frac{1}{2}$

Continent and Country	Average Harvested				Yield Per Acre				Production			
	1955		1956 $\frac{1}{2}$		1955		1956 $\frac{1}{2}$		1955		1956 $\frac{1}{2}$	
	Average 1,000 BAGS	1955-56 1,000 BAGS	Average 1,000 BAGS	1955-56 1,000 BAGS	Average 1,000 BAGS	1955-56 1,000 BAGS	Average 1,000 BAGS	1955-56 1,000 BAGS	Average 1,000 BAGS	1955-56 1,000 BAGS	Average 1,000 BAGS	1955-56 1,000 BAGS
SOUTH AMERICA:												
Argentina	4	6	17	16	1,116	1,100	874	969	4,984	6,999	14,530	14,191
AFRICA:												
Kenya	17	11	19	20	790	567	412	400	13,764	6,240	7,824	7,853
Nyasaland	-	4 1/2	4 1/2	-	1,636	2,127	2,492	220	244	318	318	172
Union of South Africa	-	3 1/2	3 1/2	-	400	425	457	-	1,200	1,200	1,200	1,200
ASIA:												
Malaya	3 1/2	3 1/2	5	6	3 1/2	3 1/2	3 1/2	3 1/2	5,722	11,600	4,700	3,400
TOTAL COUNTRIES SHOWN									21,690	24,242	36,867	35,216

See footnotes at end of tables.

DARK AIR-CURED TOBACCO: Estimated average, world and production in specified countries, harvested in first half of calendar year 1956, with comparisons,

[illegible]

See footnotes at end of table.

LONG SUN-DRIED TOMATO: Estimated average yield and production in specified countries, harvested in first half of calendar year 1956, with comparisons, term sales weight $\frac{1}{2}$

Continent and Country	Average Harvested				Yield Per Acre				Production			
	1955		1956 $\frac{1}{2}$		1955		1956 $\frac{1}{2}$		1955		1956 $\frac{1}{2}$	
	Average 1,000 BAGS	1955 1,000 BAGS	Average 1,000 BAGS	1956 $\frac{1}{2}$ 1,000 BAGS	Average 1,000 BAGS	1955 1,000 BAGS	Average 1,000 BAGS	1956 $\frac{1}{2}$ 1,000 BAGS	Average 1,000 BAGS	1955 1,000 BAGS	Average 1,000 BAGS	1956 $\frac{1}{2}$ 1,000 BAGS
NORTH AMERICA:												
Mexico	13	37	44	38	921	1,098	1,016	1,009	12,200	40,046	45,194	38,360
SOUTH AMERICA:												
Paraguay	16	13	16	16	894	1,075	930	930	13,344	14,038	14,882	15,000
ASIA:												
India	31	21	12	13	21	917	962	962	21	11,000	12,500	12,500
Philippines, Republic of	195	167	21	21	549	473	31	31	104,800	79,000	85,000	87,000
TOTAL COUNTRIES SHOWN	31	31	2	6	31	31	569	569	130,284	133,084	137,480	136,820

See footnotes at end of tables.

DARK SUN-DRIED TOMATO: Estimated average yield and production in specified countries, harvested in first half of calendar year 1956, with comparisons farm sales weight $\frac{1}{2}$

Continent and Country	Average Harvested				Yield Per Acre				Production			
	1955		1956 $\frac{1}{2}$		1955		1956 $\frac{1}{2}$		1955		1956 $\frac{1}{2}$	
	Average 1,000 BAGS	1955 1,000 BAGS	Average 1,000 BAGS	1956 $\frac{1}{2}$ 1,000 BAGS	Average 1,000 BAGS	1955 1,000 BAGS	Average 1,000 BAGS	1956 $\frac{1}{2}$ 1,000 BAGS	Average 1,000 BAGS	1955 1,000 BAGS	Average 1,000 BAGS	1956 $\frac{1}{2}$ 1,000 BAGS
NORTH AMERICA:												
Costa Rica	-	3	11	21	-	704	675	722	-	2,481	7,000	15,000
Guatemala	-	-	-	-	-	-	-	-	-	-	-	-
Honduras	-	-	-	-	-	-	-	-	-	-	-	-
Nicaragua	-	-	-	-	-	-	-	-	-	-	-	-
El Salvador	-	-	-	-	-	-	-	-	-	-	-	-
United States (includes wrapper, binder & filler)	42	51	64	56	449	603	888	939	19,669	30,719	57,139	51,568
United States (filler)	6	8	6	365	420	887	939	939	2,188	3,606	6,349	5,730
Belize	56	67	75	62	413	507	531	527	29,106	33,938	40,299	32,573
Paraguay (shade grown)	2	3	3	3	680	762	970	932	1,364	2,287	3,316	2,992
Paraguay (shade grown)	2	3	3	3	680	762	970	932	1,364	2,287	3,316	2,992
Guatemala (cigarette & chewing)	2	3	3	3	883	724	785	751	1,765	2,171	2,472	1,856
AFRICA:												
Nyaland	21	21	4	4	21	515	515	500	1,395	3,492	2,321	2,100
Northern Rhodesia	21	21	1	1	450	400	400	400	51	467	385	300
Sierra Leone	108	121	132	132	726	780	808	815	78,400	94,440	106,490	107,520
ASIA:												
India	31	31	94	96	31	990	990	990	21	93,000	95,000	95,000
Thailand	1	1	1	1	1,000	1,000	1,000	1,000	2,200	2,200	2,200	2,200
TOTAL COUNTRIES SHOWN	50	56	77	77	500	500	388	388	22,660	29,660	34,931	34,692

See footnotes at end of tables.

FIRE-CURED TOBACCO. Estimated average, yield and production in specified countries, harvested in first half of calendar year 1956, with comparisons, 1/

Continents and Country	Average Harvested				Yield Per Acre				Production			
	1955		1956 2/		1955		1956 2/		1955		1956 2/	
	1,000 acres	acres	1,000 acres	acres	1,000 acres	acres	1,000 acres	acres	1,000 acres	acres	1,000 acres	acres
SOUTH AMERICA:												
Argentina	-	-	-	-	-	-	-	-	-	-	-	-
Colombia	-	-	-	-	-	-	-	-	-	-	-	-
Venezuela	-	-	-	-	-	-	-	-	-	-	-	-
AFRICA:												
Kenya	-	-	-	-	-	-	-	-	-	-	-	-
Malawi	-	-	-	-	-	-	-	-	-	-	-	-
Nigeria	-	-	-	-	-	-	-	-	-	-	-	-
Rhodesia	-	-	-	-	-	-	-	-	-	-	-	-
ASIA:												
China	-	-	-	-	-	-	-	-	-	-	-	-
India	-	-	-	-	-	-	-	-	-	-	-	-
Malaya	-	-	-	-	-	-	-	-	-	-	-	-
Philippines	-	-	-	-	-	-	-	-	-	-	-	-
Thailand	-	-	-	-	-	-	-	-	-	-	-	-
TOTAL COUNTRIES SHOWN	4	3	2	2	700	680	800	800	1,245	1,700	1,700	2,125

See footnotes at end of tables.

ORIENTAL (FRANKLIN) TOBACCO. Estimated yield and production in specified countries, harvested in first half of calendar year 1956, with comparisons, 1/

Continents and Country	Average Harvested				Yield Per Acre				Production			
	1955		1956 2/		1955		1956 2/		1955		1956 2/	
	1,000 acres	acres	1,000 acres	acres	1,000 acres	acres	1,000 acres	acres	1,000 acres	acres	1,000 acres	acres
SOUTH AMERICA:												
Argentina	-	-	-	-	-	-	-	-	-	-	-	-
Colombia	-	-	-	-	-	-	-	-	-	-	-	-
Venezuela	-	-	-	-	-	-	-	-	-	-	-	-
AFRICA:												
Kenya	-	-	-	-	-	-	-	-	-	-	-	-
Malawi	-	-	-	-	-	-	-	-	-	-	-	-
Nigeria	-	-	-	-	-	-	-	-	-	-	-	-
Rhodesia	-	-	-	-	-	-	-	-	-	-	-	-
ASIA:												
China	-	-	-	-	-	-	-	-	-	-	-	-
India	-	-	-	-	-	-	-	-	-	-	-	-
Malaya	-	-	-	-	-	-	-	-	-	-	-	-
Philippines	-	-	-	-	-	-	-	-	-	-	-	-
Thailand	-	-	-	-	-	-	-	-	-	-	-	-
TOTAL COUNTRIES SHOWN	3	3	1	1	3	3	1,003	1,003	3	3	10,000	13,000

Footnotes

1/ Farm sales weight is about 10 percent above the average dry weight which is normally reported in export trade statistics. 2/ Preliminary, 3/ Not available. 4/ Less than 500 acres. 5/ Less than a 5-year average. 6/ Included in other light air-cured. 7/ May include some light air-cured.

Foreign Agricultural Service. Official estimates of foreign countries, reports from agricultural attaches and other U. S. representatives abroad, results of office research, and other information.

World Markets

United States Tobacco Exports Largest Since 1946

The United States tobacco industry enjoyed an excellent export year in calendar 1955--the best since 1946. Total exports (declared weight) of unmanufactured tobacco amounted to 538.6 million pounds, (value \$355.3 million) compared with 453.6 million pounds (value \$303.9 million) in 1954. The volume in 1955 was 18.7 percent larger than for the previous year, and the value was up 16.9 percent. Exports in 1955 were favored by a high level of economic activity abroad, an improved gold and dollar reserves position in a number of important foreign outlets, and increasing consumption of cigarettes made from light tobaccos.

Shipments made under provisions of P. L. 480 in calendar 1955 amounted to some 42 million pounds, representing about one-half of the total increase in exports from the previous year.

Prospects are that some decline in exports may occur in 1956. There are problems in a number of markets, for example, the Philippines, that may reduce imports. In addition, supplies of competitive cigarette tobaccos are becoming larger. Increased prices for lower grades of U. S. flue-cured and Burley probably will affect purchases by a number of countries where price is the primary consideration. Additional trade barriers to U. S. exports, such as the ever-increasing number of bilateral trade agreements negotiated between tobacco-producing countries and import markets, exchanging tobacco for manufactured goods, will make the task of U. S. tobacco exporters more difficult. It is likely, however, that exports made under Public Law 480 programs for tobacco in calendar 1956 will exceed the 1955 level.

Flue-cured tobacco exports in 1955 totaled 454.7 million pounds (declared weight) compared with 374.8 million in 1954. This represents an increase of about 21 percent. The export value totaled \$305.9 million compared with \$258.3 million for the previous year. Flue-cured exports last year were the largest for any calendar year since 1946. The sharp increase in 1955 was due chiefly to larger takings by the United Kingdom, the West German Republic and Japan. Many other countries, however, took more flue-cured last year than in 1954. These included: Austria, Belgium, Denmark, Spain, Thailand, Australia, Indochina, India, Egypt and Pakistan. There were decreases in exports to such countries as the Netherlands, Finland, Ireland, Sweden and Indonesia.

The average declared export valuation per pound for flue-cured tobacco decreased slightly in 1955. Last year, the average export value per pound was 67.3 cents, compared with 68.9 cents for 1954.

The United Kingdom, as usual, was the principal purchaser of United States flue-cured tobacco in 1955. That country took 179.3 million pounds or 39 percent of total flue-cured exports, compared with 148.2 million pounds in 1954. The West German Republic, with 47.7 million pounds, ranked second in 1955. Australia was the third-ranking outlet, taking 30.7 million pounds. About 3 5 million pounds of flue-cured tobacco were exported in 1955 under the provisions of Public Law 480. The program included the following 1955 exports of flue-cured leaf: United Kingdom, 21.4 million pounds; Japan, 5.0 million; Finland, 2.9 million; Thailand, 2.6 million; Pakistan, 1.6 million; France, 0.9 million; and Israel, 0.3 million.

Burley tobacco exports in calendar 1955 totaled some 31.3 million pounds (declared weight), valued at \$17.5 million, compared with 29.6 million pounds, valuation \$15.2 million in 1954. This represented an increase of 6 percent by volume, and 15 percent by value over 1954. The West German Republic, which took 5.9 million pounds was the first-ranking destination, followed by Portugal with 4.1 million, and Sweden, 3.1 million pounds. Exports to Sweden in 1954 amounted to only 0.3 million pounds. Exports of Burley last year under the provisions of Public Law 480 totaled about 4.0 million pounds. Japan was the principal purchaser under P. L. 480, taking more than 1 million pounds, but significant quantities moved to Italy, Finland, and Austria. The shipments to Japan represented the only significant movement of Burley tobacco to Japan of record.

Kentucky-Tennessee fire-cured tobacco exports in 1955 totaled 21.4 million pounds--compared with 20.9 million pounds in 1954. The 1955 valuation was \$11.3 million compared with \$10.6 million in 1954. Exports to Italy were far above those made during 1954. Exports to Sweden, Norway, and the United Kingdom were also up substantially from the previous year. On the other hand, decreases occurred in shipments to France, Switzerland, Cameroon and French West Africa. Shipments under Public Law 480 totaled about 2.5 million pounds, chiefly destined to Italy.

Virginia fire-cured and sun-cured. Exports of Virginia fire-cured tobacco last year amounted to about 4.3 million pounds, compared with 3.9 million in 1954. The 1955 exports were substantially larger to the West German Republic and the United Kingdom. Decreases occurred in the case of Norway, Australia and several less-important outlets. A total of about 250,000 pounds of Virginia fire-cured leaf was shipped to Austria and Finland during 1955 under P. L. 480. Exports of Virginia sun-cured in 1955 totaled only 65,000 pounds--a little below the previous year's figure of 81,000 pounds. Norway took practically all of the exports in both years.

Black Fat, etc. Exports totaled 5.3 million pounds in 1955, up 17 percent from the 4.5 million exported in 1954. Increases were noted in the case of The Gold Coast, Nigeria and French West Africa--the three largest outlets for Black Fat. The export value of Black Fat rose from \$3.6 million in 1954 to \$4.1 million last year.

Maryland tobacco exports last year were at the high level of 8.4 million pounds--only 3 percent below the postwar record exports of 8.7 million attained in 1954. Switzerland continued as the principal market for Maryland leaf, taking 5.0 million pounds, or about 60 percent of the total. Substantial increases over the previous year were noted in the case of Spain and the West German Republic. About 350,000 pounds were shipped to the Free Territory of Trieste in 1955, although there were no shipments to that destination in 1954.

One Sucker tobacco exports were sharply above those for 1954, due principally to shipments to Madagascar, totaling nearly a million pounds. Exports in 1955 totaled 1.7 million, against 0.9 million the year before. Exports to Nigeria amounted to only 69,000 pounds in 1955, compared with 229,000 in 1954 and 610,000 in 1953.

Green River exports, totaling 1.8 million pounds in 1955, were 13 percent below the 2.1 million pounds exported in 1954. A fairly sizeable increase in exports to the United Kingdom was more than offset by the drop in shipments to France from 738,000 pounds in 1954 to nothing in 1955.

Cigar Leaf. Total exports of cigar leaf amounted to 6.0 million pounds last year--up about 13 percent from the 1954 level of 5.3 million. Exports of cigar wrapper leaf climbed from 3.4 million pounds in 1954 to 4.2 million in 1955, largely due to increased shipments to the West German Republic, which took more than one-half of the total exports of this kind of leaf. Exports of cigar binder were virtually the same as those in 1954--about 1.7 million pounds. Cigar filler leaf exports, at 202,000 pounds were somewhat above the 1954 figure of 159,000. Total value of cigar leaf exports in 1955 was \$6.6 million, compared with \$6.7 million in 1954. About 128,000 pounds of cigar binder tobacco moved to Austria in 1955 under the provisions of Public Law 480.

Perique exports, at 108,000 pounds, were more than double the 50,000 shipped out in 1954. As usual, the United Kingdom was the largest market for Perique.

Exports of trimmings, stems and scrap rose from 2.7 million pounds in 1954 to 3.3 million last year. The largest increases occurred in shipments to Tangier and the West German Republic.

UNITED STATES: Exports of unmanufactured tobacco by types, calendar year 1955, with comparisons

Type	(Declared weight)											
	Average 1935-39		Average 1947-51		1953		1954		1955		1/	
	1,000 pounds	1,000 metric tons	1,000 pounds	1,000 metric tons	1,000 pounds	1,000 metric tons	1,000 pounds	1,000 metric tons	1,000 pounds	1,000 metric tons	1,000 pounds	1,000 metric tons
Flue-cured												
Barbados	312,889	112,466	368,078	204,995	444,706	296,798	374,819	258,262	454,747	305,885		
Barbados	10,635	2,253	32,465	14,759	25,007	13,053	23,560	15,203	31,349	17,503		
Tennessee	48,959	6,379	24,591	9,824	19,485	9,245	20,945	10,612	21,413	11,259		
Dark-fired Virginia	9,049	2,101	6,046	3,080	4,276	2,759	3,933	2,454	4,340	2,708		
Virginia Sun-cured 2/	5,395	1,225	7,345	4,317	8,422	31	81	563	84	68		
Green River	3,019	609	1,726	595	1,458	572	2,103	718	1,827	784		
One Sealer	956	82	3,063	1,272	1,023	674	864	338	1,705	403		
Black Fat	8,867	1,659	4,669	2,604	3,481	2,964	4,537	3,380	5,337	4,053		
Cigar leaf												
Wrapper	-	-	-	-	3,401	5,812	3,400	4,985	4,155	5,148		
Binder	-	-	-	-	3,100	2,599	1,723	1,677	1,670	1,376		
Filter	-	-	-	-	8,382	1,832	8,382	1,832	8,382	1,832		
Total cigar leaf	2/1,269	2/524	2/9,770	2/20,565	7,283	8,246	5,282	6,179	6,027	6,291		
Perique	132	52	79	68	66	66	50	56	108	86		
Trimings, stems, and scrap	19,632	466	8,116	407	3,027	366	2,729	400	3,286	454		
Total	620,797	157,797	486,352	252,716	513,655	340,435	453,572	303,872	538,576	355,251		

1/ Preliminary. 2/ Class established January 1952.

Compiled in Foreign Agricultural Service from the records of the Bureau of the Census.

UNITED STATES: Total exports of unmanufactured tobacco, calendar year 1955,
with comparison, by countries of destination

(Declared Weight)					
Country of Destination	1954 1/	1955 1/	Country of Destination	1954 1/	1955 1/
	pounds	pounds		pounds	pounds
NORTH AMERICA:			ASIA:		
Canada	680	725	Syria	-	39
CENTRAL AMERICA:			Lebanon	-	45
Mexico	5,881	2,883	Israel	229	477
Guatemala	349	637	Jordan	492	838
British Honduras	91	60	Aden	-	85
El Salvador	511	478	India	1,301	2,943
Honduras	191	176	Pakistan	2,163	2,614
Nicaragua	477	630	Ceylon	830	1,059
Costa Rica	123	110	Thailand (Siam)	4,582	8,633
Panama, Republic of	125	106	Vietnam, Laos & Cambodia	2,053	4,436
Canal Zone	6	2	British Malaya	126	288
Bahamas	131	105	Indonesia, Republic of	10,326	9,887
Cuba	80	80	Philippines, Republic of	19,454	21,065
Jamaica	11	6	Macao	10	-
Haiti	207	162	Hong Kong	3,470	4,191
Dominican Republic	6	-	Taiwan (Formosa)	1,796	2,189
Leeward & Windward Islands	108	53	Japan	6,693	17,454
Barbados	4	1	Nansei & Nanpo Islands,		
Trinidad & Tobago	365	410	n.e.c.	-	92
Netherland Antilles	33	39	OCEANIA:		
SOUTH AMERICA:			Australia	28,230	31,626
Colombia	17	8	New Zealand	6,640	7,639
Venezuela	429	752	AFRICA:		
British Guiana	411	257	French Morocco	403	332
Surinam (Netherlands			Tangiers	104	672
Guiana)	179	152	Algeria	526	223
French Guiana	37	13	Tunisia	567	587
Peru	217	216	Egypt	5,739	9,451
Chile	212	119	Anglo-Egyptian Sudan	1	-
Brasil	72	61	Canary Islands	399	314
Paraguay	12	5	Spanish Africa, n.e.c.	33	80
Uruguay	1,914	903	Cameroons	664	439
EUROPE:			French Equatorial Africa	73	62
Iceland	68	147	French West Africa	1,522	1,508
Sweden	9,633	11,260	Gold Coast	1,258	1,374
Norway	7,628	7,813	Nigeria	3,767	3,987
Denmark	9,584	12,299	British West Africa,		
United Kingdom	150,016	182,689	n.e.c.	6	5
Ireland	14,050	12,834	Madeira Islands	59	-
Netherlands	38,115	30,899	Angola	116	892
Belgium & Luxembourg	12,519	24,771	Western Portuguese		
France	12,581	7,879	Africa, n.e.c.	54	6
West Germany	43,309	58,837	Liberia	48	3
East Germany	55	216	Belgian Congo	1,467	1,167
Austria	1,924	5,439	Mauritius & Dependencies	66	179
Czechoslovakia	198	-	British East Africa	974	1,137
Switzerland	11,695	10,752	Mozambique	71	70
Finland	6,049	5,271	Madagascar	-	1,319
Azores	131	66	Union of South Africa	-	167
Spain	3,173	4,878	Estimated Shipments 2/	-	737
Portugal	7,406	6,869	Total Quantity	453,572	528,574
Gibraltar	48	168	Total Value,		
Malta, Gozo & Cyprus	876	1,217	1,000 Dollars	303,872	355,251
Italy	3,915	4,457			
Free Territory of Trieste	2	353			
Yugoslavia	1,406	-			

1/ Preliminary. 2/ Estimated shipments are estimates based on 10 percent sample shipments valued \$100 - 499.
See Census Publications No. FT-410, Part 1, page 3, Jan.-Nov. 1955.

Compiled in Foreign Agricultural Service from records of the Bureau of the Census.

UNITED STATES: Exports of flue-cured tobacco, calendar year 1955
with comparisons, by countries of destination

Country of Destination	(Declared Weight)							
	Average		1953	1954 1/	1955 1/	1954 1/	1955 1/	
	1,000	1,000	1,000	1,000	1,000	1,000	1,000	
	pounds	pounds	pounds	pounds	pounds	dollars	dollars	
NORTH AMERICA:								
Canada	4,331	161	55	31	100	28	68	
CENTRAL AMERICA:								
Mexico	3	478	1,326	1,802	1,628	1,368	1,203	
Guatemala	55	314	455	187	290	158	214	
British Honduras	19	36	11	16	-	14	-	
El Salvador	38	527	550	511	478	416	347	
Honduras	18	88	176	174	161	154	129	
Nicaragua	93	310	457	356	467	202	264	
Costa Rica	15	48	47	75	69	79	76	
Panama, Republic of	10	12	-	-	24	-	19	
Bermuda	1	-	-	-	-	-	-	
Bahamas	-	1	7	-	-	-	-	
Cuba	2	-	-	-	-	-	-	
Jamaica	384	14	35	-	-	-	-	
Haiti	13	93	74	142	118	120	106	
Dominican Republic	3	-	-	-	-	-	-	
Leeward & Windward Islands	-	45	122	80	30	45	20	
Barbados	91	7	5	4	1	3	1	
Trinidad & Tobago	449	102	22	95	16	79	15	
Other British West Indies	29	-	-	-	-	-	-	
Netherlands Antilles	2/	-	34	-	-	-	-	
French West Indies	1	-	-	-	-	-	-	
SOUTH AMERICA:								
Colombia	55	302	-	3	-	3	-	
Venezuela	4	166	463	300	620	323	636	
British Guiana	155	328	309	355	231	267	175	
Surinam (Netherlands Guiana)	9	34	99	159	144	116	102	
French Guiana	-	-	-	32	-	24	-	
Ecuador	2	-	-	-	-	-	-	
Peru	33	154	-	107	216	90	180	
Bolivia	-	1	-	-	-	-	-	
Chile	6	78	60	57	26	45	20	
Brazil	41	64	3	-	-	-	-	
Paraguay	1	10	8	10	-	4	-	
Uruguay	229	979	1,059	1,646	750	1,483	697	
Argentina	926	1,110	-	-	-	-	-	
EUROPE:								
Iceland	-	20	-	-	-	-	-	
Sweden	3,642	6,938	7,043	7,895	6,086	6,574	4,908	
Norway	2,487	4,479	4,114	5,103	5,320	3,415	3,624	
Denmark	2,498	7,577	9,906	7,949	10,536	5,009	6,920	
United Kingdom	193,519	174,736	177,648	148,162	179,348	108,687	128,033	
Ireland	6,081	16,926	16,877	13,701	12,412	9,838	8,800	
Netherlands	9,490	23,672	29,819	29,924	23,184	13,223	9,789	
Belgium & Luxembourg	3,712	15,479	7,535	7,808	19,873	3,072	7,148	
France	1,071	1,684	2,269	2,653	2,592	2,094	1,949	
Germany	4,060	36,803	3/ 61,006	3/ 35,676	2/ 47,715	3/ 22,293	3/ 30,802	
Austria	12	3,043	2,055	1,254	3,969	706	1,630	
Czechoslovakia	16	201	-	-	-	-	-	
Hungary	9	-	-	-	-	-	-	
Switzerland	257	3,990	3,108	2,807	2,940	1,724	1,886	
Finland	1,028	1,668	2,794	5,126	4,487	3,026	2,677	
Estonia	169	-	-	-	-	-	-	
Latvia	232	-	-	-	-	-	-	
Lithuania	78	-	-	-	-	-	-	
Poland & Danzig	811	82	-	-	-	-	-	
USSR	-	2,086	-	-	-	-	-	
Azores	4/ 20	36	56	55	32	31	18	
Spain	137	380	1,476	2,085	4,021	1,753	3,171	
Portugal	803	3,358	4,144	2,747	2,524	1,305	1,133	
Gibraltar	16	8	-	-	-	-	-	
Malta, Gozo, & Cyprus	292	1,193	1,348	831	1,191	564	886	
Italy	99	3,059	4,409	1,011	326	826	191	
Free Territory of Trieste	-	157	-	2	-	1	-	
Yugoslavia	1	3	2,707	182	-	93	-	
Greece	1	8	-	-	-	-	-	
Romania	37	-	-	-	-	-	-	

continued -

UNITED STATES: Exports of flue-cured tobacco, calendar year 1955
with comparisons, by countries of destination

Country of Destination	(Declared Weight)						
	Average		1953	1954 1/	1955 1/	1954 1/	1955 1/
	1935-39	1947-51	1,000	1,000	1,000	1,000	1,000
	pounds	pounds	pounds	pounds	pounds	dollars	dollars
ASIA:							
Palestine			255	-	-	-	-
Syria	(25	799	12	-	39	-	29
Lebanon	(17	27	27	-	30	-	17
Iraq	3	-	-	-	-	-	-
Israel	-	-	-	2/ 229	477	2/ 146	311
Jordan	-	124	279	391	653	506	890
Kuwait	-	31	-	-	-	-	-
Saudi Arabia	-	3	-	-	-	-	-
Aden	4	24	70	-	85	-	19
India	2,903	7,484	1,169	1,245	2,914	1,318	2,863
Pakistan	-	543	1,714	2,163	2,614	1,953	2,339
Ceylon	924	972	961	830	1,059	749	956
Burma	-	-	19	-	-	-	-
Thailand	3,202	3,314	6,634	4,578	8,630	3,338	6,521
Indochina (Vietnam, Laos, & Cambodia)	190	1,589	3,232	1,857	3,644	1,460	2,736
British Malaya	118	-	14	126	288	52	147
Indonesia, Republic of	2,021	6,419	12,475	9,748	9,241	6,702	5,444
Macao	-	-	29	-	-	-	-
Philippines, Republic of	703	6,924	19,373	18,483	19,900	10,356	10,743
Portuguese Asia	-	10	-	-	-	-	-
China	6/ 33,885	9,714	-	-	-	-	-
Hong Kong	1,624	4,338	3,695	2,887	3,396	1,744	2,105
Taiwan	-	377	1,262	1,796	2,186	1,538	1,832
Japan	4,842	385	9,510	6,693	16,122	5,920	13,026
Nansei & Nanpo Islands	-	-	-	-	92	-	24
OCEANIA:							
Australia	19,093	19,964	26,230	27,894	30,713	22,373	23,582
New Zealand	2,703	5,311	5,508	6,224	7,202	5,151	5,880
AFRICA:							
Morocco	16	175	87	88	-	71	-
Algeria	(88	266	297	264	123	152	66
Tunisia	(137	165	287	297	76	96	96
Egypt	926	2,562	4,225	4,914	7,879	2,968	5,020
Anglo-Egyptian Sudan	-	-	-	1	-	1	-
Canary Islands	22	85	-	15	3	11	2
Spanish Africa	-	3	-	-	-	-	-
Cameroon	-	40	24	76	56	55	32
French Equatorial Africa	-	20	-	28	43	13	10
French West Africa 1/	132	116	33	38	8	22	4
Gold Coast	-	8	-	-	-	-	-
Nigeria	210	856	1,199	1,054	1,318	793	1,084
British West Africa	200	4	-	-	-	-	-
Madeira Islands	-	8	5	41	5	21	6
Angola	-	36	70	80	798	33	293
Western Portuguese Africa 2/	44	19	32	20	5	13	3
Liberia	6	6	6	3	3	-	2
Belgian Congo	-	70	490	872	1,167	551	562
Mauritius & Dependencies	-	146	55	66	179	56	155
British East Africa	-	1,202	1,054	974	1,137	838	1,005
Mozambique	13	57	62	44	59	27	37
Madagascar	-	2	20	-	14	-	9
Union of South Africa	66	645	123	-	167	-	138
Southern British Africa	2	-	-	-	-	-	-
Estimated Shipments 2/	-	-	-	-	276	-	60
Total Quantity	312,889	388,078	444,206	374,819	454,747		
Total Value, 1,000 Dollars	112,466	214,995	296,798	258,262	305,885	258,262	305,885

See footnotes at end of tables.

UNITED STATES: Exports of Burley tobacco, calendar year 1955,
with comparisons, by countries of destination

Country of Destination	(Declared Weight)						
	Average		1953	1954 1/	1955 1/	1954 1/	1955 1/
	1935-39	1947-51					
	1,000	1,000	1,000	1,000	1,000	1,000	1,000
	pounds	pounds	pounds	pounds	pounds	dollars	dollars
NORTH AMERICA:							
Canada	453	138	-	-	-	-	-
CENTRAL AMERICA:							
Mexico	99	1,005	1,510	4,030	1,209	2,289	846
Guatemala	9	155	111	137	202	124	159
British Honduras	8	7	22	17	19	12	16
El Salvador	1	5	-	-	-	-	-
Honduras	2/	9	11	14	12	15	12
Nicaragua	47	83	115	121	163	59	82
Costa Rica	10	32	29	48	39	55	43
Panama, Republic of	-	3	-	-	13	-	15
Haiti	2	32	29	64	44	49	35
Dominican Republic	23	-	-	-	-	-	-
Leeward & Windward Islands	-	1	8	2	-	1	-
Trinidad & Tobago	-	20	71	236	286	243	289
Other British West Indies	7	-	-	-	-	-	-
SOUTH AMERICA:							
Colombia	2	16	-	1	-	1	-
Venezuela	2/	13	-	128	114	153	134
Surinam	2	40	-	2	-	2	-
Ecuador	1	-	-	-	-	-	-
Peru	4	44	-	-	-	-	-
Chile	3	67	174	154	93	96	55
Brazil	9	27	-	-	-	-	-
Uruguay	30	65	45	195	117	236	132
Argentina	160	645	-	-	-	-	-
EUROPE:							
Sweden	605	1,721	1,406	299	3,145	225	2,382
Norway	434	1,181	739	655	666	438	415
Denmark	827	1,559	737	501	901	274	413
United Kingdom	279	702	421	237	220	173	169
Ireland	10	5	4	-	-	-	-
Netherlands	1,000	2,896	857	2,001	1,485	903	537
Belgium & Luxembourg	1,996	3,555	3,044	2,564	2,747	880	937
France	214	1,675	707	2,137	441	479	341
Germany, West	(467	(6,077	4,910	4,053	5,861	2,349	3,463
Germany, East	((-	-	-	-	-
Austria	17	774	850	365	1,135	215	483
Czechoslovakia	25	59	-	-	-	-	-
Hungary	3	-	-	-	-	-	-
Switzerland	46	536	1,078	705	854	371	447
Finland	72	231	524	708	689	378	357
Estonia	1	-	-	-	-	-	-
Latvia	5	-	-	-	-	-	-
Lithuania	7	-	-	-	-	-	-
Poland & Danzig	43	-	-	-	-	-	-
Azores	4/ 3	29	15	26	12	13	8
Spain	69	170	-	123	-	107	-
Portugal	2,498	4,747	3,005	4,460	4,140	1,359	1,217
Gibraltar	1	-	-	-	-	-	-
Malta, Gozo, & Cyprus	10	1	-	-	13	-	8
Italy	145	2,548	582	2,410	986	2,000	732
Free Territory of Trieste	-	20	-	-	-	-	-
Yugoslavia	-	-	851	608	-	125	-

continued -

UNITED STATES: Exports of Burley tobacco, calendar year 1955,
with comparisons, by countries of destination

Country of Destination	(Declared Weight)						
	Average		1953	1954 1/	1955 1/	1954 1/	1955 1/
	1935-39	1947-51					
	1,000	1,000	1,000	1,000	1,000	1,000	1,000
	pounds	pounds	pounds	pounds	pounds	dollars	dollars
ASIA:							
Syria	(	4	10	-	-	-	-
Lebanon	2/	30	14	-	15	-	5
Iraq	-	2/	-	-	-	-	-
Israel & Palestine	-	4	-	-	-	-	-
India	2/	4	-	37	3	51	1
Ceylon	10	-	-	-	-	-	-
Siam (Thailand)	-	7	-	-	-	-	-
Indochina (Vietnam, Laos & Cambodia)	8	48	-	22	-	17	-
Indonesia, Republic of	101	42	-	-	-	-	-
Philippines, Republic of	5	370	1,234	886	1,050	509	559
Malaya	-	-	-	10	-	3	-
China	32	1	-	-	-	-	-
Hong Kong	-	4	353	583	725	202	279
Japan	1	1	-	-	1,325	-	1,016
OCEANIA:							
Australia	557	164	168	62	802	48	572
New Zealand	3	-	-	10	19	8	15
AFRICA:							
French Morocco	2/	50	-	-	-	-	-
Algeria	213	108	91	81	54	32	24
Tunisia	(	143	-	-	21	-	8
Egypt	21	913	1,205	750	1,459	648	1,215
Canary Islands	3	-	3	-	-	-	-
Cameroon	-	-	28	25	42	11	19
French Equatorial Africa	-	-	-	14	-	5	-
French West Africa	2/	12	6	-	-	-	-
Gold Coast	1	-	-	-	-	-	-
Nigeria	5	-	2	-	-	-	-
Madeira Islands	-	1	-	-	7	3	-
Angola	-	43	28	18	94	6	31
Western Portuguese Africa, n.e.c.	20	1	-	-	1	-	1
Liberia	2/	-	-	-	-	-	-
Belgian Congo	-	6	-	29	-	24	-
Mozambique	-	5	10	25	10	12	6
Union of South Africa	2/	11	-	-	-	-	-
Estimated Shipments 9/	-	-	-	-	83	-	25
Total Quantity	10,635	32,865	25,007	29,560	31,309		
Total Value, 1,000 Dollars	2,253	14,739	13,053	15,203	17,503	15,203	17,503

See footnotes at end of tables.

UNITED STATES: Exports of Kentucky-Tennessee Fire-cured tobacco, calendar year 1955
with comparisons, by countries of destination

Country of Destination	(Declared Weight)							
	Average		1953	1954 1/	1955 1/	1954 1/	1955 1/	
	1935-39	1947-51						
	1,000	1,000	1,000	1,000	1,000	1,000	1,000	
	pounds	pounds	pounds	pounds	pounds	dollars	dollars	
NORTH AMERICA:								
Canada	151	56	35	37	28	20	15	
CENTRAL AMERICA:								
Mexico	47	2/	-	-	-	-	-	
Guatemala	-	-	242	23	145	17	105	
British Honduras	1	29	33	58	41	31	24	
El Salvador	13	-	-	-	-	-	-	
Honduras	2/	2	-	-	-	-	-	
Nicaragua	2	-	3	-	-	-	-	
Costa Rica	-	-	-	-	2	-	2	
Panama, Republic of	118	55	64	125	69	54	35	
Canal Zone	-	-	3	6	2	2	2	
Bahamas	-	32	86	90	90	31	31	
Cuba	-	5	-	-	-	-	-	
Jamaica	2	3	2	1	1	1	1	
Haiti	9	4	300	-	-	-	-	
Dominican Republic	-	-	-	3	-	2	-	
Leeward & Windward Islands	-	23	16	23	18	11	9	
Trinidad & Tobago	8	2	2	-	1	-	1	
Netherlands Antilles	4	4	2	-	11	-	3	
French West Indies	56	6	-	-	-	-	-	
Other British West Indies	19	-	-	-	-	-	-	
SOUTH AMERICA:								
Venezuela	1	-	-	-	18	-	16	
British Guiana	63	35	23	56	26	27	13	
Surinam (Netherlands Guiana)	9	15	7	13	5	6	3	
French Guiana	6	2	4	2	6	1	3	
Peru	-	-	-	110	-	92	-	
Chile	-	2/	-	1	-	1	-	
Brazil	23	28	1	10	-	9	-	
Paraguay	2	-	-	-	-	-	-	
Uruguay	28	39	34	24	13	19	11	
Argentina	150	274	-	-	-	-	-	
EUROPE:								
Iceland	-	71	-	68	147	23	54	
Sweden	2,191	1,631	651	108	748	51	378	
Norway	548	369	278	100	275	74	193	
Denmark	1,055	593	561	683	537	402	296	
United Kingdom	2,739	1,217	298	411	1,246	282	504	
Ireland	724	636	564	289	271	153	133	
Netherlands	4,832	3,964	5,368	4,509	4,517	2,156	2,010	
Belgium & Luxembourg	4,441	2,160	633	984	952	334	360	
France	18,316	4,329	1,720	6,658	4,234	3,246	2,003	
Germany, West	(3,022	(1,007	931	528	545	220	214	
Germany, East	((-	-	-	-	-	
Austria	29	43	-	28	90	23	73	
Czechoslovakia	-	4	-	159	-	136	-	
Switzerland	2,273	2,602	1,761	1,770	1,512	1,060	1,001	
Finland	82	71	20	160	47	60	14	
Estonia	5	-	-	-	-	-	-	
Latvia	32	-	-	-	-	-	-	
Lithuania	6	-	-	-	-	-	-	
Poland & Danzig	858	-	-	-	-	-	-	
Azores	4/ 30	95	75	44	18	24	11	
Spain	2,568	400	1,851	-	-	-	-	
Portugal	1,107	390	228	172	134	40	28	
Gibraltar	-	3	-	-	11	-	1	
Malta, Gozo & Cyprus	145	64	37	45	13	23	6	
Italy	427	1,415	624	446	3,101	357	2,414	
Free Territory of Trieste	-	-	16	-	-	-	-	
Yugoslavia	3	-	-	27	-	23	-	

continued -

UNITED STATES: Exports of Kentucky-Tennessee Fire-cured tobacco, calendar year 1955
with comparisons, by countries of destination

Country of Destination	(Declared Weight)						
	Average		1953	1954 1/	1955 1/	1954 1/	1955 1/
	1935-39	1947-51	1,000	1,000	1,000	1,000	1,000
	pounds	pounds	pounds	pounds	pounds	dollars	dollars
ASIA:	:	:	:	:	:	:	:
Turkey	:	-	14	-	-	-	-
Aden	:	1	-	-	-	-	-
India	:	12	1	-	-	-	-
Indochina (Vietnam, Laos & Cambodia)	:	:	:	:	:	:	:
	:	235	40	72	51	605	17
British Malaya	:	1	-	-	-	-	272
Indonesia, Republic of	:	69	49	520	578	626	-
Philippines, Republic of	:	5	-	-	-	-	408
Hong Kong	:	-	-	-	-	-	-
China	:	1	-	-	8	-	3
Japan	:	20	1	-	-	-	-
OCEANIA:	:	:	:	:	:	:	:
Australia	:	3	-	3	15	41	8
New Zealand	:	5	69	128	173	163	22
	:	:	:	:	:	102	91
AFRICA:	:	:	:	:	:	:	:
French Morocco	:	44	182	-	-	-	-
Tangier	:	-	18	-	-	-	-
Algeria	:	(767	445	71	124	42	59
Tunisia	:	(	382	188	-	-	19
Egypt	:	285	242	134	75	113	-
Canary Islands	:	507	221	110	110	103	17
Spanish Africa, n.e.c.	:	18	14	22	21	54	23
Cameroon	:	-	158	190	441	173	25
French Equatorial Africa	:	-	120	41	23	12	89
French West Africa 1/	:	635	496	668	734	444	362
Gold Coast	:	102	297	457	266	37	234
Nigeria	:	19	39	17	5	37	31
British West Africa, n.e.c.	:	20	5	-	-	-	4
Angola	:	-	31	14	18	-	7
Western Portuguese Africa, n.e.c. 2/	:	:	:	:	:	:	-
	:	29	61	63	-	-	-
Liberia	:	25	30	19	4	-	2
Belgian Congo	:	2	6	276	566	-	-
Mozambique	:	2/	-	-	-	-	-
Madagascar	:	5	9	5	-	-	-
Union of South Africa	:	1	-	-	-	-	-
Estimated Shipments 2/	:	-	-	-	118	-	41
Total Quantity	:	48,959	24,591	19,485	20,945	21,413	
Total Value, 1,000 Dollars	:	6,739	9,844	9,545	10,612	11,259	10,612
	:						11,259

See footnotes at end of tables.

UNITED STATES: Exports of Virginia Fire-cured tobacco, calendar year 1955
with comparisons, by countries of destination

Country of Destination	(Declared Weight)							
	Average		1953	1954 1/	1955 1/	1954 1/	1955 1/	
	1935-39	1947-51						
	1,000	1,000	1,000	1,000	1,000	1,000	1,000	
	pounds	pounds	pounds	pounds	pounds	dollars	dollars	
NORTH AMERICA:								
Canada	143	7	-	-	-	-	-	
CENTRAL AMERICA:								
Mexico	34	15	-	-	-	-	-	
Guatemala	2/	3	-	-	-	-	-	
El Salvador	4	-	-	-	-	-	-	
Costa Rica	12	-	-	-	-	-	-	
Panama, Republic of	1	1	-	-	-	-	-	
Leeward & Windward Islands	-	2	-	-	-	-	-	
Barbados	4	-	-	-	-	-	-	
Trinidad & Tobago	63	123	154	21	63	17	52	
Netherlands Antilles	2	-	-	-	-	-	-	
Other British West Indies	4	-	-	-	-	-	-	
SOUTH AMERICA:								
Colombia	1	-	-	-	-	-	-	
Venezuela	1	-	-	-	-	-	-	
British Guiana	1	-	-	-	-	-	-	
Surinam	2	-	-	-	-	-	-	
Ecuador	1	-	-	-	-	-	-	
Peru	4	-	-	-	-	-	-	
Bolivia	2/	1	-	-	-	-	-	
Brazil	2	-	-	-	-	-	-	
Paraguay	4	3	-	2	-	1	-	
Uruguay	10	1	9	-	-	-	-	
Argentina	112	-	-	-	-	-	-	
EUROPE:								
Sweden	815	703	486	619	651	369	378	
Norway	2,033	1,752	1,880	1,432	1,255	903	766	
Denmark	171	104	60	29	6	13	4	
United Kingdom	1,471	418	284	187	507	113	355	
Ireland	161	26	34	56	46	42	32	
Netherlands	455	589	125	424	548	165	329	
Belgium & Luxembourg	356	305	7	26	46	12	25	
France	197	14	17	-	-	-	-	
Germany, West	(1,005	(263	283	150	314	109	226	
Germany, East	((-	-	-	-	-	
Austria	92	244	215	64	96	52	75	
Czechoslovakia	109	34	-	21	-	24	-	
Switzerland	130	536	266	285	309	174	176	
Finland	10	32	-	54	47	25	22	
Estonia	7	-	-	-	-	-	-	
Latvia	8	-	-	-	-	-	-	
Lithuania	2	-	-	-	-	-	-	
Poland & Danzig	11	-	-	-	-	-	-	
Asoree	4/ 6	2/	-	-	-	-	-	
Portugal	345	126	22	24	71	9	26	
Malta, Goso & Cyprus	5	-	-	-	-	-	-	
Italy	85	14	-	48	24	34	19	
Yugoslavia	5	-	-	-	-	-	-	
Greece	2	-	-	-	-	-	-	
Rumania	2	-	-	-	-	-	-	

continued -

UNITED STATES: Exports of Virginia Fire-cured tobacco, calendar year 1955
with comparisons, by countries of destination

Country of Destination	(Declared Weight)					
	Average		1953	1954 1/	1955 1/	1954 1/
	1935-39	1947-51	1953	1954 1/	1955 1/	1954 1/
	1,000	1,000	1,000	1,000	1,000	1,000
	pounds	pounds	pounds	pounds	pounds	dollars
						dollars
<u>ASIA:</u>						
Israel & Palestine	-	7	-	-	-	-
Aden	2	-	-	-	-	-
India	4	35	24	18	21	16
Thailand	-	-	-	4	-	2
Indochina (Vietnam, Laos & Cambodia)	3	79	-	-	-	-
Indonesia, Republic of	36	37	-	-	-	-
Philippines, Republic of	2/	27	-	-	-	-
China	28	1	-	-	-	-
Hong Kong	-	31	-	-	20	-
Taiwan	-	10	-	-	-	-
<u>OCEANIA:</u>						
Australia	236	115	270	196	63	165
New Zealand	276	262	130	231	253	179
<u>AFRICA:</u>						
French Morocco	-	6	-	-	-	-
Algeria & Tunisia	170	16	-	31	-	13
Egypt	22	4	-	-	-	-
Canary Islands	8	54	-	-	-	-
Spanish Africa	4	-	-	-	-	-
Cameroon	-	24	-	-	-	-
French West Africa 2/	235	11	10	20	-	12
Gold Coast	25	3	-	-	-	-
British West Africa	10	-	-	-	-	-
Madagascar	-	3	-	11	-	5
Angola	-	1	-	-	-	-
Western Portuguese Africa 3/	10	4	-	-	-	-
Liberia	82	-	-	-	-	-
Mozambique	5	-	-	-	-	-
Madagascar	5	-	-	-	-	-
Total Quantity	9,049	6,046	4,276	3,933	4,340	
Total Value, 1,000 Dollars	2,101	3,080	2,759	2,454	2,708	2,454

See footnotes at end of tables.

UNITED STATES: Exports of Virginia Sun-cured tobacco 10/, calendar year 1955
with comparisons, by countries of destination

Country of Destination	(Declared Weight)					
	1953	1954 1/	1955 1/	1954 1/	1955 1/	
	1,000	1,000	1,000	1,000	1,000	
	pounds	pounds	pounds	pounds	dollars	dollars
<u>CENTRAL AMERICA:</u>						
Honduras	-	1	-	1	-	-
<u>EUROPE:</u>						
Norway	-	80	63	42	-	26
Germany, West	34	-	-	-	-	-
Switzerland	6	-	-	-	-	-
<u>ASIA:</u>						
India	-	-	2	-	-	2
<u>AFRICA:</u>						
Algeria	2	-	-	-	-	-
Total Quantity	42	81	65			
Total Value, 1,000 Dollars	31	43	28	43		28

See footnotes at end of tables.

UNITED STATES: Exports of Black Fat tobacco, calendar year 1955
with comparisons, by countries of destination

Country of Destination	Average		1953	1954 1/	1955 1/	1954 1/	1955 1/
	1935-39	1947-51					
	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 dollars	1,000 dollars
NORTH AMERICA:							
Canada	2	2	-	-	-	-	-
CENTRAL AMERICA:							
British Honduras	44	13	-	-	-	-	-
El Salvador	1	-	-	-	-	-	-
Honduras	-	1	-	-	-	-	-
Nicaragua	3	-	-	-	-	-	-
Panama, Republic of	6	1	-	-	-	-	-
Bahamas	-	63	33	30	7	9	2
Jamaica	1	1	-	-	-	-	-
Haiti	8	5	-	-	-	-	-
Dominican Republic	1	1	-	-	-	-	-
Leeward & Windward Islands	-	21	9	3	5	2	3
Barbados	2	-	-	-	-	-	-
Trinidad & Tobago	1	1	-	-	1	-	1
Netherlands Antilles	77	3	37	33	28	11	9
French West Indies	141	6	2/	-	-	-	-
Other British West Indies	154	-	-	-	-	-	-
SOUTH AMERICA:							
British Guiana	112	43	-	-	-	-	-
Surinam	37	8	2	4	1	1	1
French Guiana	28	8	3	1	4	1	2
EUROPE:							
Norway	1	-	-	-	-	-	-
Denmark	7	-	-	-	-	-	-
United Kingdom	28	2/	-	7	29	6	23
Netherlands	28	6	-	-	-	-	-
Belgium & Luxembourg	89	2/	-	-	-	-	-
Germany, West	168	-	-	-	9	-	4
Germany, East	-	-	-	-	-	-	-
Austria	1	-	-	-	-	-	-
Switzerland	3	6	-	-	-	-	-
Ascres	1	-	-	-	-	-	-
Portugal	7	20	-	-	-	-	-
Malta, Gozo & Cyprus	5	3	-	-	-	-	-
ASIA:							
India	4	-	-	-	-	-	-
Portuguese Asia	-	5	-	-	-	-	-
China	2	8	-	-	-	-	-
OCEANIA:							
Australia	2	-	-	-	-	-	-
AFRICA:							
French Morocco	1	1	-	-	-	-	-
Algeria & Tunisia	3	-	-	-	-	-	-
Egypt	4	1	-	-	-	-	-
Anglo-Egyptian Sudan	-	1	-	-	-	-	-
Canary Islands	104	34	34	86	38	45	19
Spanish Africa	67	4	4	12	26	6	16
Cameroon	-	95	69	100	112	52	56
French Equatorial Africa	-	142	-	2	7	2	4
French West Africa 2/	2,691	708	494	750	1,056	401	576
Gold Coast	1,301	1,147	1,047	992	1,337	838	1,153
Nigeria	2,687	2,006	2,055	2,476	2,600	1,984	2,144
British West Africa	481	-	-	6	-	3	-
Angola	-	36	-	-	-	-	-
Western Portuguese Africa 3/	326	209	94	35	-	19	-
Liberia	215	22	-	-	-	-	-
Belgian Congo	7	2	-	-	-	-	-
Seychelles & Dependencies	-	1	-	-	-	-	-
British East Africa	1	2/	-	-	-	-	-
Mozambique	2	-	-	-	-	-	-
Madagascar	7	-	-	-	-	-	-
Union of South Africa	2	-	-	-	-	-	-
Southern British Africa	4	-	-	-	-	-	-
Estimated Shipments 2/	-	-	-	-	67	-	40
Total Quantity	8,867	4,669	3,881	4,537	5,327		
Total Value, 1,000 Dollars	1,629	2,604	2,964	3,380	4,053	3,380	4,053

See footnotes at end of tables.

UNITED STATES: Exports of Maryland tobacco, calendar year 1955
with comparisons, by country of destination

Country of Destination	(Declared Weight)						
	Average		1953	1954 1/	1955 1/	1954 1/	1955 1/
	1935-39	1947-51					
	1,000	1,000	1,000	1,000	1,000	1,000	1,000
	pounds	pounds	pounds	pounds	pounds	dollars	dollars
NORTH AMERICA:							
Canada	2/	8	-	-	-	-	-
CENTRAL AMERICA:							
Mexico	-	-	-	38	41	33	30
Guatemala	2/	2/	-	-	-	-	-
Honduras	2/	1	2	2	3	2	3
Trinidad & Tobago	-	-	-	-	-	-	-
SOUTH AMERICA:							
Surinam	2/	2/	1	-	-	-	-
EUROPE:							
Sweden	26	-	-	-	-	-	-
Norway	5	11	-	7	-	5	-
Denmark	127	44	20	38	6	12	1
United Kingdom	34	31	-	-	-	-	-
Netherlands	1,833	557	441	432	464	149	174
Belgium & Luxembourg	427	233	300	425	271	137	161
France	668	354	-	-	221	-	175
Germany, West	(173)	(308)	252	481	887	122	239
Germany, East	()	()	110	-	-	-	-
Austria	52	24	-	9	-	8	-
Czechoslovakia	8	-	-	-	-	-	-
Switzerland	1,602	4,843	5,546	5,817	4,976	4,790	4,151
Finland	-	4	-	-	-	-	-
Estonia	5	-	-	-	-	-	-
Poland & Danzig	2	-	-	-	-	-	-
Azores	-	-	-	2	-	1	-
Spain	21	98	328	436	766	191	315
Portugal	-	3	-	-	-	-	-
Gibraltar	-	-	110	-	-	-	-
Italy	19	2/	-	-	-	-	-
Yugoslavia	-	-	749	589	-	115	-
Free Territory of Trieste	-	-	-	-	353	-	122
ASIA:							
Israel	-	1	-	-	-	-	-
Thailand	-	2/	-	-	3	-	3
Indochina (Vietnam, Laos & Cambodia)	-	10	-	-	-	-	-
Philippines, Republic of	2/	54	-	-	-	-	-
China	2	-	-	-	-	-	-
Hong Kong	-	-	-	-	7	-	3
OCEANIA:							
Australia	1	6	18	-	-	-	-
AFRICA:							
French Morocco	49	402	202	111	132	32	37
Algeria	(333)	58	-	-	-	-	60
Tunisia	()	299	44	280	269	69	36
Egypt	1	-	8	-	-	-	-
Canary Islands	1	-	-	-	-	-	-
Liberia	1	2/	-	-	-	-	-
Mozambique	-	2/	4	2	1	1	1
Estimated Shipments	-	-	-	-	20	-	10
Total Quantity	5,390	7,347	8,135	8,669	8,420		
Total Value, 1,000 Dollars	1,236	4,313	5,276	5,667	5,485	5,667	5,485

See footnotes at end of tables.

UNITED STATES: Exports of One Sucker tobacco, calendar year 1955
with comparisons, by countries of destination

Country of Destination	(Declared Weight)					
	Average		1953	1954 1/	1955 1/	
	1935-39	1947-51				
	1,000	1,000	1,000	1,000	1,000	
	pounds	pounds	pounds	pounds	pounds	
						1954 1/
						1955 1/
						dollars
						dollars
<u>NORTH AMERICA:</u>						
Canada	30	26	-	-	-	-
<u>CENTRAL AMERICA:</u>						
Haiti	1	2/	-	-	-	-
Barbados	3	-	-	-	-	-
Trinidad & Tobago	51	48	28	13	43	8
Netherlands Antilles	2/	2	-	-	-	-
French West Indies	2	-	-	-	-	-
<u>SOUTH AMERICA:</u>						
Surinam	-	2	-	-	-	-
Argentina	1	-	-	-	-	-
<u>EUROPE:</u>						
Norway	2/	8	17	-	-	-
Denmark	6	2/	-	-	-	-
United Kingdom	5	18	-	-	-	-
Ireland	2	-	-	-	-	-
Netherlands	14	262	139	85	-	24
Belgian & Luxembourg	682	293	157	178	221	57
France	-	747	-	320	389	47
Germany, West	(13	(73	4	3	-	1
Germany, East	((-	-	-	-
Austria	-	11	-	-	-	-
Switzerland	9	2	2	-	-	-
Spain	-	242	-	-	-	-
Portugal	-	1	-	-	-	-
Yugoslavia	-	-	55	-	-	-
<u>ASIA:</u>						
Philippines, Republic of	2	-	-	-	-	-
Portuguese Asia	-	1	-	-	-	-
<u>AFRICA:</u>						
French Morocco	-	60	-	-	-	-
Algeria	-	44	-	-	-	-
Tunisia	-	113	-	-	-	-
Canary Islands	16	9	-	26	-	6
Spanish Africa	1	-	-	-	3	-
Cameroon	-	18	9	-	-	2
French Equatorial Africa	-	26	-	-	-	-
French West Africa 7/	61	72	2	10	-	6
Gold Coast	11	40	-	-	-	-
Nigeria	5	800	610	229	69	189
British West Africa	25	-	-	-	-	-
Western Portuguese Africa 3/	3	57	-	-	-	-
Liberia	13	88	-	-	-	-
Madagascar	-	-	-	-	980	180
Total Quantity	956	3,063	1,023	864	1,705	
Total Value, 1,000 Dollars	82	1,272	674	338	403	338
						403

See footnotes at end of tables.

UNITED STATES: Exports of Green River tobacco, calendar year 1955
with comparisons, by countries of destination

Country of Destination	Average		1953	1954 1/	1955 1/	1954 1/	1955 1/
	1935-39	1947-51					
	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 dollars	1,000 dollars
(Declared Weight)							
NORTH AMERICA:							
Canada	5	-	-	-	18	-	13
CENTRAL AMERICA:							
Panama, Republic of	-	1	-	-	-	-	-
Salvador	-	-	-	7	8	3	3
Haiti	-	5	-	-	-	-	-
French West Indies	4	-	-	-	-	-	-
SOUTH AMERICA:							
French Guiana	-	-	-	2	3	1	1
EUROPE:							
Sweden	11	2/	-	-	-	-	-
Norway	9	5	-	-	-	-	-
Denmark	1	-	-	-	-	-	-
United Kingdom	1,957	505	1,026	967	1,201	495	549
Ireland	156	57	17	3	105	1	104
Netherlands	37	243	739	177	-	46	-
Belgium & Luxembourg	716	201	1	131	40	48	10
France	2/	240	-	798	-	108	-
Germany, West	(1	(50	-	-	-	-	-
Germany, East	((-	-	-	-	-
Switzerland	-	9	-	-	-	-	-
Azores	4/	1	-	-	-	-	-
Spain	-	173	-	-	-	-	-
Portugal	-	-	-	3	-	1	-
ASIA:							
Indonesia, Republic of	-	-	-	-	20	-	15
AFRICA:							
Egypt	1	-	-	-	-	-	-
Canary Islands	-	-	-	-	54	-	12
Cameroon	-	16	-	22	53	11	26
French Equatorial Africa	-	1	-	6	-	3	-
French West Africa 1/	73	11	-	-	-	-	-
Gold Coast	46	5	-	-	-	-	-
Nigeria	-	4	13	3	-	2	-
British West Africa	1	-	-	-	-	-	-
Liberia	-	199	33	44	-	29	-
Madagascar	-	-	-	-	225	-	61
Total Quantity	3,019	1,726	1,829	2,103	1,827		
Total Value, 1,000 Dollars	609	595	717	748	794	748	794

See footnotes at end of tables.

UNITED STATES: Exports of total cigar leaf tobacco, calendar year 1955
with comparisons, by countries of destination

Country of Destination	(Declared Weight)							
	Average		1953	1954 1/	1955 1/	1954 1/	1955 1/	
	1935-39	1947-51	1,000	1,000	1,000	1,000	1,000	
	pounds	pounds	pounds	pounds	pounds	dollars	dollars	
NORTH AMERICA:								
Canada	73	355	598	516	459	1,585	1,247	
CENTRAL AMERICA:								
Mexico	2/	30	9	11	5	22	9	
Guatemala	-	6	2/	2	2/	3	1	
El Salvador	3	2/	2/	-	-	-	-	
Honduras	2/	1	2/	-	-	-	-	
Nicaragua	2/	24	-	-	-	-	-	
Panama, Republic of	4	5	-	-	-	-	-	
Canal Zone	-	1	-	-	-	-	-	
Bermuda	-	2/	-	-	-	-	-	
Bahamas	-	-	-	4	-	2	-	
Cuba	2/	-	-	-	-	-	-	
Jamaica	2/	1	-	9	5	7	1	
Haiti	-	3	3	1	2/	1	1	
Dominican Republic	2/	1	14	3	2/	6	1	
Leeward & Windward Islands	-	1	-	-	-	-	-	
Trinidad & Tobago	-	7	-	-	-	-	-	
Other British West Indies	1	-	-	-	-	-	-	
SOUTH AMERICA:								
Colombia	1	11	9	13	7	70	38	
Venezuela	-	2/	1	1	2/	4	1	
Surinam	-	7	2	1	2	2	3	
French Guiana	3	-	-	-	-	-	-	
Chile	2/	4	-	-	-	-	-	
Brazil	2/	66	124	62	61	112	81	
Paraguay	-	1	-	-	-	-	-	
Uruguay	-	1	2	2	4	7	10	
Argentina	2/	40	-	-	-	-	-	
EUROPE:								
Sweden	-	308	45	180	126	221	160	
Norway	1	28	2	3	4	6	10	
Denmark	-	930	281	188	170	215	211	
United Kingdom	134	55	15	17	30	27	50	
Ireland	-	2	-	-	-	-	-	
Netherlands	80	811	527	323	555	242	475	
Belgium & Luxembourg	23	625	926	616	564	440	414	
France	140	2/	16	75	2	90	4	
Germany, West	(	339	2,817	2,348	3,102	2,536	2,914
Germany, East	(	344	1,305	55	216	27	161
Austria	2	178	204	149	276	197		
Czechoslovakia	-	14	-	18	-	42	-	
Switzerland	-	190	29	302	124	347	187	
Finland	-	44	-	1	1	2	2	
U.S.S.R.	-	12	-	-	-	-	-	
Azores	4/	1	4	4	4	7	8	
Spain	-	22	-	-	-	-	-	

continued -

UNITED STATES: Exports of total cigar leaf tobacco, calendar year 1955
with comparisons, by countries of destination

Country of Destination	(Declared Weight)							
	Average		1953	1954 1/	1955 1/	1954 1/	1955 1/	
	1935-39	1947-51						
	1,000	1,000						1,000
	pounds	pounds	pounds	pounds	pounds	dollars	dollars	
Portugal	-	36	-	-	-	-	-	
Gibraltar	2/	8	65	8	-	2	-	
Malta, Gozo & Cyprus	-	11	-	-	-	-	-	
Free Territory of Trieste	-	9	-	-	-	-	-	
Yugoslavia	-	-	18	-	-	-	-	
ASIA:	-	-	-	-	-	-	-	
Israel & Palestine	-	8	14	-	-	-	-	
India	-	3	2	1	3	2	8	
Indochina (Vietnam, Laos & Cambodia)	-	15	275	123	187	56	64	
Indonesia, Republic of	1	-	-	-	-	-	-	
Philippines, Republic of	449	81	51	32	71	112	112	
China	-	2	-	-	-	-	-	
Taiwan (Formosa)	-	-	3	-	3	-	7	
Japan	1	-	-	-	-	-	-	
OCEANIA:	-	-	-	-	-	-	-	
Australia	1	34	6	47	3	62	5	
New Zealand	2/	2	2	2	2	5	4	
AFRICA:	-	-	-	-	-	-	-	
French Morocco	-	183	-	-	-	-	-	
Tangier	-	6	8	7	12	8	12	
Algeria	(1	761	132	26	4	59	8	
Tunisia	(	84	-	-	-	-	-
Egypt	1	2/	-	-	-	-	-	
Canary Islands	2/	47	39	77	73	104	116	
Spanish Africa	-	2	-	-	-	-	-	
Cameroon	-	13	-	-	-	-	-	
French Equatorial Africa	-	2/	66	-	-	-	-	
French West Africa 7/	1	33	-	-	-	-	-	
Gold Coast	1	1	-	-	-	-	-	
Nigeria	1	6	-	-	-	-	-	
British West Africa	2	-	-	-	-	-	-	
Madeira Islands	-	1	-	-	-	-	-	
Angola	-	1	-	-	-	-	-	
Western Portuguese Africa 8/	1	3	-	-	-	-	-	
Liberia	1	8	-	-	-	-	-	
Mozambique	3	-	-	-	-	-	-	
Union of South Africa	2/	2/	-	-	-	-	-	
Estimated Shipments 2/	-	-	-	-	79	-	71	
Total Quantity	1,269	12,977	7,588	5,282	6,027	-	-	
Total Value, 1,000 Dollars	524	10,565	8,586	6,709	6,593	6,709	6,593	

See footnotes at end of tables.

UNITED STATES: Exports of cigar wrapper 13/, calendar year 1955
with comparisons, by countries of destination

Country of Destination	(Declared Weight)					
	1949-51 (average)	1953	1954 1/	1955 1/	1954 1/	1955 1/
	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 dollars	1,000 dollars
NORTH AMERICA:						
Canada	281	390	400	342	1,456	1,132
CENTRAL AMERICA:						
Mexico	4	9	11	5	22	9
Honduras	-	-	-	2/	-	1
Guatemala	-	-	2	2/	3	2
El Salvador	2/	1	1	2/	1	1
Dominican Republic	1	6	2	2/	6	1
Jamaica	-	-	9	5	7	1
SOUTH AMERICA:						
Colombia	10	9	13	7	70	38
Venezuela	2/	1	1	2/	4	1
Surinam	2	2	1	1	2	2
Brazil	85	124	62	61	112	81
Uruguay	1	2	2	4	7	10
Argentina	2	-	-	-	-	-
EUROPE:						
Sweden	2/	25	14	46	18	54
Norway	2	2	3	4	6	10
Denmark	262	173	103	113	129	152
United Kingdom	3	-	13	26	24	47
Netherlands	118	194	182	262	176	302
Belgium & Luxembourg	98	407	377	465	240	344
France	2/	16	71	2	89	4
Germany, West	(2,209	2,196	1,780	2,290	2,011	2,323
Germany, East	-	143	-	194	-	150
Austria	121	36	21	8	45	6
Czechoslovakia	8	-	18	-	42	-
Switzerland	21	13	150	92	191	141
Finland	-	-	1	1	2	2
U.S.S.R.	19	-	-	-	-	-
Azores	3	4	4	4	7	8
Gibraltar	-	7	-	-	-	-
Free Territory of Trieste	1	-	-	-	-	-
ASIA:						
Israel & Palestine	2/	6	-	-	-	-
India	2	2	1	3	2	8
Indochina (Vietnam, Laos & Cambodia)	7	3	13	-	23	-
Philippines, Republic of	52	51	32	71	112	112
Taiwan (Formosa)	-	3	-	3	-	7
OCEANIA:						
Australia	3	-	1	-	2	-
New Zealand	-	1	2	2	5	4
AFRICA:						
Tangier	5	8	7	12	8	12
Algeria	17	28	26	4	59	8
Canary Islands	34	39	77	73	104	116
Spanish Africa	3	-	-	-	-	-
Estimated Shipments 9/	-	-	-	55	-	59
Total Quantity	3,374	3,901	2,400	4,155		
Total Value, 1,000 Dollars	6,117	5,812	4,985	5,148	4,985	5,148

See footnotes at end of tables.

UNITED STATES: Exports of cigar binder tobacco 13/, calendar year 1955
with comparisons, by countries of destination

(Declared Weight)						
Country of Destination	1949-51 (average)	1953	1954 1/	1955 1/	1954 1/	1955 1/
	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 dollars	1,000 dollars
NORTH AMERICA:						
Canada	80	136	116	113	129	114
CENTRAL AMERICA:						
Mexico	12	-	-	-	-	-
Guatemala	8	-	-	-	-	-
Honduras	1	-	-	-	-	-
Nicaragua	9	-	-	-	-	-
Panama, Republic of	4	-	-	-	-	-
Haiti	4	1	-	-	-	-
Dominican Republic	-	8	1	-	1	-
Trinidad and Tobago	4	-	-	-	-	-
SOUTH AMERICA:						
Surinam	7	-	-	1	-	1
Brazil	3	-	-	-	-	-
EUROPE:						
Sweden	78	20	166	80	203	106
Norway	11	-	-	-	-	-
Denmark	379	108	85	57	86	59
United Kingdom	28	15	4	4	3	3
Netherlands	569	333	110	293	58	173
Belgium & Luxembourg	436	504	233	99	198	70
France	-	-	4	-	1	-
Germany, West	(2,745	614	568	812	524	591
Germany, East	(	1,162	55	22	27	11
Austria	260	142	183	141	231	191
Switzerland	46	16	152	32	156	46
Spain	37	-	-	-	-	-
Portugal	32	-	-	-	-	-
Malta, Goso & Cyprus	15	-	-	-	-	-
Italy	1	-	-	-	-	-
Free Territory of Trieste	14	-	-	-	-	-
Yugoslavia	-	18	-	-	-	-
ASIA:						
Israel & Palestine	5	8	-	-	-	-
Indochina (Vietnam, Laos & Cambodia)	10	8	-	-	-	-
China	3	-	-	-	-	-
OCEANIA:						
Australia	10	6	46	3	60	3
New Zealand	4	1	-	-	-	-
AFRICA:						
Algeria	44	-	-	-	-	-
Tunisia	5	-	-	-	-	-
Cameroon	10	-	-	-	-	-
French West Africa	12	-	-	-	-	-
Gold Coast	1	-	-	-	-	-
Angola	2	-	-	-	-	-
Western Portuguese Africa	5	-	-	-	-	-
Estimated Shipments 2/	-	-	-	13	-	8
Total Quantity	4,894	3,100	1,723	1,670		
Total Value, 1,000 Dollars	4,722	2,599	1,677	1,376	1,677	1,376

See footnotes at end of tables.

UNITED STATES: Exports of cigar filler tobacco 13/, calendar year 1955
with comparisons by country of destination

Country of Destination	(Declared Weight)					
	1949-51	1953	1954 1/	1955 1/	1954 1/	1955 1/
	(average)					
	1,000	1,000	1,000	1,000	1,000	1,000
	pounds	pounds	pounds	pounds	dollars	dollars
<u>NORTH AMERICA:</u>						
Canada	16	72	-	4	-	1
<u>CENTRAL AMERICA:</u>						
Mexico	2	-	-	-	-	-
Bermuda	2/	-	-	-	-	-
Bahamas	-	-	4	-	2	-
Jamaica	1	-	-	-	-	-
Haiti	2	1	-	-	-	-
<u>SOUTH AMERICA:</u>						
Colombia	4	-	-	-	-	-
<u>EUROPE:</u>						
Norway	4	-	-	-	-	-
Denmark	17	-	-	-	-	-
Netherlands	38	-	31	-	8	-
Belgium & Luxembourg	124	15	6	-	2	-
Germany, West	(1,965	7	-	-	-	-
Germany, East	(-	-	-	-	-
Austria	97	-	-	-	-	-
Switzerland	12	-	-	-	-	-
Gibraltar	14	58	8	-	2	-
<u>ASIA:</u>						
Indochina (Vietnam, Laos & Cambodia)	-	264	110	187	33	64
Philippines, Republic of	66	-	-	-	-	-
<u>AFRICA:</u>						
French Morocco	226	-	-	-	-	-
Algeria	1,150	104	-	-	-	-
Tunisia	110	-	-	-	-	-
Cameroon	10	-	-	-	-	-
French Equatorial Africa	-	66	-	-	-	-
French West Africa	43	-	-	-	-	-
Estimated Shipments 2/	-	-	-	11	-	4
Total Quantity	2,901	587	159	202		
Total Value, 1,000 Dollars	1,322	175	47	69	47	69

See footnotes at end of tables.

UNITED STATES: Exports of Perique tobacco, calendar year 1955
with comparisons, by country of destination

(Declared Weight)							
Country of Destination	Average		1953	1954 1/	1955 1/	1954 1/	1955 1/
	1935-39	1947-51					
	1,000	1,000	1,000	1,000	1,000	1,000	1,000
	pounds	pounds	pounds	pounds	pounds	dollars	dollars
<u>NORTH AMERICA:</u>							
Canada	26	9	3	3	7	3	6
<u>SOUTH AMERICA:</u>							
Colombia	-	1	-	-	1	-	1
Uruguay	-	-	-	1	-	1	-
Argentina	1	-	-	-	-	-	-
<u>EUROPE:</u>							
Sweden	2/	5	-	-	-	-	-
Norway	13	17	20	10	11	9	7
Denmark	2/	1	4	-	1	-	1
United Kingdom	86	37	36	34	77	41	60
Ireland	1	2/	-	-	-	-	-
Netherlands	1	1	1	-	2	-	2
Belgium & Luxembourg	1	1	-	-	-	-	-
Germany, West	(1	(1	-	-	-	-	-
Germany, East	((-	-	-	-	-
Austria	-	1	-	-	-	-	-
Switzerland	2/	5	2	2	-	2	-
Finland	2	-	-	-	-	-	-
<u>ASIA:</u>							
Japan	-	-	-	-	7	-	6
Estimated Shipments 9/	-	-	-	-	2	-	3
Total Quantity	132	79	66	50	108		
Total Value, 1,000 Dollars	52	62	66	56	86	56	86

See footnotes at end of tables.

UNITED STATES: Exports of Trimmings, stems, and scrap tobacco, calendar year 1955
with comparisons, by country of destination

Country of Destination	(Declared Weight)							
	Average		1953	1954 1/	1955 1/	1954 1/	1955 1/	
	1935-39	1947-51						
	1,000	1,000	1,000	1,000	1,000	1,000	1,000	
	pounds	pounds	pounds	pounds	pounds	dollars	dollars	
<u>NORTH AMERICA:</u>								
Canada	1	2/	9	93	113	33	36	
<u>CENTRAL AMERICA:</u>								
Mexico	2	-	-	-	-	-	-	
Cuba	-	-	-	80	80	2	2	
Netherlands Antilles	2	-	-	-	-	-	-	
Other British West Indies	1	-	-	-	-	-	-	
<u>SOUTH AMERICA:</u>								
Paraguay	-	-	-	-	5	-	4	
Uruguay	-	21	28	46	19	17	7	
<u>EUROPE:</u>								
Sweden	1,060	1,108	519	532	504	50	43	
Norway	108	98	387	238	219	21	17	
Denmark	201	316	244	196	142	17	22	
United Kingdom	169	46	2	14	31	3	5	
Ireland	-	-	-	1	-	11/	-	
Netherlands	20	353	64	240	144	58	31	
Belgium & Luxembourg	67	65	40	87	57	12	11	
France	1	-	-	-	-	-	-	
Germany, West	(1,277	(197	279	70	404	11	52	
Germany, East	((-	-	-	-	-	
Austria	-	34	-	-	-	-	-	

continued -

UNITED STATES: Exports of Trimmings, stems, and scrap tobacco, calendar year 1955
with comparisons, by country of destination

Country of Destination	(Declared Weight)		1953	1954 1/	1955 1/	1954 1/	1955 1/
	Average						
	1935-39	1947-51					
	1,000	1,000	1,000	1,000	1,000	1,000	1,000
	pounds	pounds	pounds	pounds	pounds	dollars	dollars
Switzerland	16	36	75	7	37	2	8
Finland	1	-	-	-	-	-	-
Latvia	2	-	-	-	-	-	-
Poland & Danzig	9	-	-	-	-	-	-
Spain	2	1	-	529	91	52	8
Gibraltar	3	-	40	40	157	9	23
Italy	-	-	-	-	20	-	4
Malta, Goso & Cyprus	2	3	-	-	-	-	-
ASIA:							
Israel & Palestine	-	2	-	-	-	-	-
Jordan	-	38	58	101	135	11	21
Kuwait	-	10	-	-	-	-	-
Indochina (Vietnam, Laos & Cambodia)	2	-	-	-	-	-	-
Indonesia, Republic of	10	-	-	-	-	-	-
Philippines, Republic of	203	120	-	53	44	48	40
China	15,180	4,623	-	-	-	-	-
Kwantung	774	-	-	-	-	-	-
Hong Kong	2	627	31	-	-	-	-
Japan	421	-	-	-	35	-	3
OCEANIA:							
Australia	-	-	-	16	4	9	2
AFRICA:							
French Morocco	-	134	-	204	200	21	20
Tangier	-	200	1,093	97	660	10	67
Algeria	(6	-	-	-	-	-	-
Tunisia	(-	-	-	-	-	-
Egypt	-	5	-	-	-	-	-
Canary Islands	76	45	154	85	43	14	7
Spanish Africa	2/	34	-	-	-	-	-
French West Africa 7/	9	-	-	-	-	-	-
Madeira	-	-	4	-	-	-	-
Western Portuguese Africa 8/	5	-	-	-	-	-	-
Estimated Shipments 9/	-	-	-	-	92	-	16
Total Quantity	19,622	8,116	3,027	2,729	3,286		
Total Value, 1,000 Dollars	466	647	366	400	454	400	454

Footnotes

- 1/ Preliminary.
- 2/ Less than 500 pounds.
- 3/ West Germany.
- 4/ Includes Madeira Islands for 1935-39.
- 5/ Not separately shown prior to January 1, 1954.
- 6/ Does not include 1,313 thousand pounds to Kwantung which is included in grand total.
- 7/ Includes all French possessions in Africa, n.e.c.
- 8/ Includes all Portuguese possessions in Africa, n.e.c.
- 9/ Estimated shipments are estimates based on 10 percent sample shipments valued \$100-499. See Census Publication No. FT-410, Part 1, Page 3, Jan.-Nov. 1955.
- 10/ Class established January 1952.
- 11/ Less than \$500.
- 12/ Includes 110 thousand pounds shipped to Germany in 1947 under Army Civilian Supply Program.
- 13/ Class breakdown established January 1949.

Compiled in Foreign Agricultural Service from records of the Bureau of the Census.

U. S. EXPORTS OF MANUFACTURED TOBACCO

United States exports of all tobacco products combined during 1955 were valued at \$62.7 million--slightly below the \$63.2 million in 1954. A significant increase in the volume and value of smoking tobacco in bulk was noted last year. This was insufficient, however, to offset declines in the export of all other tobacco products.

Cigarettes

In 1955, exports of cigarettes totaled 15.1 billion pieces, valued at \$55.5 million. This compared with 15.4 billion cigarettes, valuation \$57.1 million the year before. For the past several years, a declining trend has been noted in cigarette exports. The 1955 volume of exports, however, was more than three times the prewar level. Due to price increases it was about six times the prewar valuation.

Cigarette exports to North American countries last year (including Central America and the Caribbean area) totaled about 2.2 billion pieces, compared with 2.4 billion in 1954. Most countries in the area took fewer cigarettes in 1955, with the largest decline occurring in the case of the Netherlands Antilles, which took nearly 100 million fewer cigarettes than in 1954. There was a slight decline in total exports to South American countries. Exports to Colombia fell from 533 million to 172 million pieces, but exports to Venezuela, the largest foreign customer for U. S. cigarettes, rose to 1.7 billion pieces from 1.5 billion a year earlier.

Exports of cigarettes to European countries accounted for roughly one-third of the total shipped out last year. Sharp increases from 1954 levels were noted in the case of France and Spain. Exports to France totaled 981 million pieces last year compared with 639 million in 1954; exports to Spain amounted to 538 million in 1955, against only 312 million for the previous year. Significant declines occurred in the case of Gibraltar, Yugoslavia, Italy, Belgium - Luxembourg, and Poland-Danzig. The total quantity exported to European destinations last year was virtually the same as in 1954.

Asian countries took a slightly larger quantity of U. S. cigarettes last year. Most of the increase occurred in exports to Hong Kong and British Malaya. Exports to the Philippine Republic dropped from 506 million pieces in 1954 to 291 million in 1955.

Exports to African countries declined from about 2.5 billion pieces in 1954 to about 2.3 billion last year. Exports to Spanish Africa continued to rise, totaling 683 million pieces in 1955, against 438 million in 1954 and only 10 million pieces in 1953. Exports to Tangiers in 1955, at 1 billion pieces, were little more than one-half the 1953 level.

Cigars and Cheroots

The 1955 exports of cigars and cheroots totaled 5.8 million pieces, with a valuation of \$262,000. This compared with 1954 exports of 8.2 million pieces, valued at \$386,000. Exports to all major destinations appear to have declined from 1954 levels.

Chewing Tobacco and Snuff

Exports of chewing tobacco and snuff in 1955 (1.6 million pounds) were down about one-fourth from the 1954 figure of 2.1 million pounds. This drop occurred largely as the result of considerably smaller exports to Australia and the Philippine Republic.

Smoking Tobacco

Total exports of smoking tobacco in packages in 1955 amounted to 546,000 pounds, valued at \$608,000. This was only slightly below the 1954 level in both volume and value. Canada continued as the principal foreign outlet for this product, taking more than one-third of total exports.

Exports of smoking tobacco in bulk were 34 percent larger in 1955 than in 1954--6.2 million pounds, as compared with 4.6 million. The valuation rose to \$4.9 million from less than \$3.4 million in 1954. The principal outlets last year were Spain and Australia, each of which took in excess of 1 million pounds.

COMPARISON OF THE EXPORTS OF MANUFACTURED TOBACCO PRODUCTS

Product	Average 1934-1938		Average 1943-1952		1953		1954 1/		1955 1/	
	Quantity	Value	Quantity	Value	Quantity	Value	Quantity	Value	Quantity	Value
		: 1,000 :		: 1,000 :		: 1,000 :		: 1,000 :		: 1,000 :
		: dollars :		: dollars :		: dollars :		: dollars :		: dollars :
Cigarettes (million pieces)	4,774	9,058	18,436	54,730	16,249	58,054	15,426	57,132	15,126	55,543
Cigars & Cheroots (1,000 pieces)	2/ 8,204	2/ 435	5,112	353	6,314	320	8,228	386	5,849	262
Chewing tobacco (1,000 pounds)	1,787	708	2,142	1,434	1,631	1,344	2,118	1,708	1,562	1,320
Smoking tobacco in packages (1,000 pounds)	3/	3/	670	633	638	684	572	624	546	608
Smoking tobacco in bulk (1,000 pounds)	3/	3/	1,674	1,288	4,680	3,726	4,644	3,357	6,247	4,924
Total Value		:10,201 :		:58,438 :		:64,128 :		:63,207 :		:62,657 :

Compiled in Foreign Agricultural Service from records of the Bureau of the Census.

1/ Preliminary.

2/ Average 1935-1938, not listed separately in 1934.

3/ Not available.

CIGARETTES, EXPORTS BY COUNTRY, AVERAGE 1934-38, 1943-52, ANNUAL 1953, 1954, 1955

Continent & Country	Average		1953	1954 $\frac{1}{2}$	1955 $\frac{1}{2}$
	1934-1938	1948-1952			
	Million Pieces	Million Pieces	Million Pieces	Million Pieces	Million Pieces
NORTH AMERICA:					
Iceland	.1	51.9	150.6	125.4	136.5
Canada	11.9	(335.6	554.2	437.5	373.0
Newfoundland & Labrador	6.5	(
Mexico	30.3	294.1	160.1	72.8	31.9
Costa Rica	28.5	28.1	29.5	20.7	15.7
Panama Republic	(388.9	471.9	661.7	555.0	494.6
Panama Canal Zone	(	213.9	171.5	135.6	122.3
Bermuda	29.8	59.9	66.8	67.2	64.5
Bahamas	-	29.3	48.2	67.3	38.7
Cuba	46.8	329.4	322.9	303.5	335.1
Haiti	19.2	72.2	23.8	42.2	31.6
Netherlands Antilles	105.2	1,019.1	743.0	550.0	453.4
Other	48.2	62.5	55.6	62.0	66.2
Total North America	715.9	2,968.9	2,987.9	2,439.2	2,168.5
SOUTH AMERICA:					
Colombia	90.7	242.5	316.4	532.9	171.8
Venezuela	38.7	1,181.3	1,410.6	1,545.8	1,746.1
Ecuador	6.7	126.8	201.8	181.5	288.1
Peru	10.4	62.7	92.3	119.9	132.3
Uruguay	7.8	148.4	143.5	160.6	124.7
Argentina	63.6	13.2	2.9	2.6	1.8
Other	9.0	29.8	38.8	40.5	30.1
Total South America	226.9	1,804.7	2,206.3	2,583.8	2,494.9

See footnotes at end of table.

CIGARETTES, EXPORTS BY COUNTRY, AVERAGE 1934-38, 1948-52, ANNUAL 1953, 1954, 1955

Continent & Country	Average		1953	1954		1955
	1934-1938	1948-1952		1954	1955	
	Million Pieces	Million Pieces	Million Pieces	Million Pieces	Million Pieces	
EUROPE:						
Sweden	79.7	509.2	837.7	689.6	679.0	
Norway	3.6	21.3	130.8	94.7	133.6	
Denmark	54.1	166.3	275.3	303.2	371.9	
United Kingdom	98.7	27.8	39.3	35.9	35.7	
Ireland	.2	10.7	15.3	9.8	9.3	
Netherlands	127.9	205.3	286.0	387.9	422.8	
Belgium & Luxembourg	63.4	984.6	957.9	848.7	506.8	
France	307.2	383.5	691.5	638.6	981.2	
Germany	31.8	273.9	434.3	2/ 460.8	2/ 499.7	
Austria	1.4	108.7	69.5	91.0	87.0	
Switzerland	16.2	717.2	416.6	341.4	351.5	
Poland & Danzig	8.3	102.1	48.0	76.0	32.2	
Spain	15.6	7.2	310.9	312.3	538.4	
Portugal	4.7	27.6	15.8	14.7	17.9	
Gibraltar	28.4	116.6	162.3	178.8	33.3	
Italy	33.5	375.0	380.7	357.1	284.3	
Czechoslovakia	1.0	330.7	-	-	-	
Hungary	1.3	195.1	-	-	-	
Rumania	2.8	45.6	-	-	-	
Yugoslavia	.4	95.9	280.2	118.9	16.9	
Other	9.7	84.5	38.1	45.2	36.4	
Total Europe	899.9	4,788.8	5,391.2	5,004.6	5,037.9	

See footnotes at end of table.

CIGARETTES, EXPORTS BY COUNTRY, AVERAGE 1934-38, 1948-52, ANNUAL 1953, 1954, 1955

Continent & Country	Average		1953	1954		1955	
	1934-1938	1948-1952		1954	1955		
	Million Pieces	Million Pieces	Million Pieces	Million Pieces	Million Pieces		
<u>ASIA:</u>							
Syria		12.0	26.3	29.4	31.2		
Lebanon	6.9	51.9	37.8	108.4	78.2		
Iraq	-	1.2	4.8	7.7	8.1		
Palestine & Transjordan	2.3	26.8	21.5	-	-		
Palestine 2/	-	-	-	42.8	48.5		
Kuwait	-	126.7	235.1	275.9	256.9		
Saudi-Arabia	2.3	111.5	97.1	101.8	109.6		
State of Bahrain	-	112.4	114.9	98.6	118.7		
Thailand	2.4	13.5	32.4	22.8	15.7		
Indochina (Vietnam, Laos, Cambodia)	15.1	10.1	2.5	5	-		
Macao	-	-	39.4	46.6	63.9		
Indonesia (Rep.)	15.8	68.7	39.3	6.1	4.3		
Philippine Republic	2,543.6	4,486.1	435.3	505.6	290.8		
China	84.2	2.3	-	-	-		
Hong Kong	22.1	952.4	947.9	721.1	842.3		
British Malaya	2.5	475.7	500.8	439.9	510.8		
Nansai & Nanpo Islands	-	-	-	338.3	449.3		
Japan	7.2	95.9	348.1	20.2	32.0		
Other	27.2	45.6	63.7	87.8	91.6		
Total Asia	2,732.2	6,592.8	2,946.9	2,853.5	2,951.9		

See footnotes at end of table.

CIGARETTES, EXPORTS BY COUNTRY, AVERAGE 1934-38, 1948-1952, ANNUAL 1953, 1954, 1955

Continent & Country	Average		1953	1954 1/		1955 1/	
	1934-1938	1948-1952		Million Pieces	Million Pieces	Million Pieces	Million Pieces
<u>OCEANIA:</u>							
Australia	19.0	2.9	5.3		6.8		.8
New Zealand	17.6	4.6	-		.8		-
French Oceania	23.4	-	-		-		-
French Pacific Islands	-	37.1	36.5		27.4		31.3
Trust Territory of the Pacific Islands 2/	-	-	-		25.9		31.3
Other	.7	9.7	26.9		23.1		5.2
Total Oceania	60.7	54.3	68.7		84.0		68.6
<u>AFRICA:</u>							
French Morocco	12.5	81.9	106.3		114.3		136.4
Tangiers	-	1,468.7	1,929.5		1,392.1		1,007.2
Algeria	(15.1	1.3	.2		12.7		13.9
Tunisia	(4.0	4.0	8.1		15.7		-
Canary Islands	37.5	42.4	14.7		25.1		10.7
Spanish Africa	.3	10.2	9.6		438.3		682.5
Egypt	33.8	111.5	128.7		74.7		80.8
French West Africa	37.4	80.7	46.9		60.2		93.6
British West Africa	-	1.9	25.6		5.0		-
Liberia	3.8	68.2	77.3		74.0		62.9
Belgian Congo	.5	173.7	123.5		65.3		30.5
Union of South Africa	3.4	38.5	1.7		3.2		9.8
French Somaliland	-	63.8	123.5		98.1		67.7
Other	3.7	80.1	52.2		81.7		62.9
Total Africa	148.0	2,226.9	2,647.8		2,460.4		2,258.9
Estimated Shipments 4/	-	-	-		-		145.2
TOTAL QUANTITY	4,773.6	18,436.4	16,248.8		15,425.5		15,125.9
TOTAL VALUE(1,000 dollars)	9,058	54,730	58,054		57,132		55,543

See footnotes at end of table.

UNITED STATES EXPORTS OF CIGARS AND CHERROOTS, AVERAGE 1935-38, 1948-52,
ANNUAL 1953, 1954, 1955

Continent & Country	Average		1953	1954 1/	1955 1/
	1935-1938	1948-1952			
	5/				
	1,000	1,000	1,000	1,000	1,000
	pieces	pieces	pieces	pieces	pieces
<u>NORTH AMERICA:</u>					
Canada (including New-					
foundland & Labrador)	59	56	2,651	2,919	1,937
Iceland	2	1	-	92	110
Panama Republic	1,111	502	296	347	256
Canal Zone	-	899	873	1,205	656
Bermuda	25	70	291	391	186
Netherlands Antilles	159	120	174	134	13
Other	226	122	20	45	43
Total North America	1,582	1,770	4,305	5,133	3,201
<u>SOUTH AMERICA:</u>					
Total South America	169	72	30	20	30
<u>EUROPE:</u>					
Belgium & Luxembourg	92	73	429	1,210	691
Germany	182	1,245	-	2/ 18	-
United Kingdom	2,176	16	-	20	-
Italy	2,514	4	-	-	-
Switzerland	3	35	194	158	177
Other	272	167	68	160	116
Total Europe	5,239	1,540	691	1,566	984
<u>ASIA:</u>					
Saudi Arabia	10	513	626	476	-
Japan	3	393	187	102	-
Other	210	172	32	104	49
Total Asia	223	1,078	845	682	49
<u>OCEANIA:</u>					
Total Oceania	322	12	24	20	-
<u>AFRICA:</u>					
Egypt	67	23	19	-	5
Union of South Africa	553	502	322	712	480
Other	49	115	78	95	220
Total Africa	669	640	419	807	705
Estimated Shipments 4/	-	-	-	-	880
TOTAL QUANTITY	8,204	5,112	6,314	8,228	5,849
TOTAL VALUE (\$1,000)	435	353	320	386	262

See footnotes at end of table.

UNITED STATES EXPORTS OF CHEWING TOBACCO, AVERAGE 1934-38, 1948-52,
ANNUAL 1953, 1954, 1955

Country	Average		1953	1954 1/	1955 1/
	1934-1938	1948-1952			
	1,000	1,000	1,000	1,000	1,000
(Chewing, plug & other 6/)	pounds	pounds	pounds	pounds	pounds
Canada, Newfoundland & Labrador	229	60	28	20	10
Panama Republic 7/	(141	102	89	94	79
Canal Zone	(141	36	34	23	19
Bahamas	8/	17	15	22	10
Netherlands Antilles	36	46	23	26	16
United Kingdom	147	38	23	23	16
Philippines, Republic of	609	833	526	684	315
Australia	516	732	778	1,134	957
French Pacific Islands	8/	58	106	61	71
Other	109	220	9	31	44
Estimated Shipments 4/	-	-	-	-	25
TOTAL QUANTITY	1,787	2,142	1,631	2,118	1,562
TOTAL VALUE (\$1,000)	708	1,434	1,344	1,708	1,320

See footnotes at end of table.

UNITED STATES EXPORTS OF SMOKING TOBACCO IN PACKAGES, & BULK
AVERAGE 1948-52, ANNUAL 1953, 1954, 1955

Country	Average 1948-52	1953	1954 ^{1/}	1955 ^{1/}
	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds
PACKAGES:				
Canada	252	249	180	198
Mexico	7	10	11	1
Canal Zone	11	11	11	10
Netherlands Antilles	17	14	7	4
Sweden	29	54	67	36
Denmark	24	48	36	42
United Kingdom	14	13	13	13
Belgium & Luxembourg	28	21	11	15
France	14	18	28	27
Germany	7	2/ 11	2/ 12	2/ 14
Switzerland	14	14	17	12
Italy	8	17	21	12
Philippines, Republic of	73	9	23	11
Indonesia	10	10	12	2
Hong Kong	37	37	26	20
Other	125	102	97	49
Estimated Shipments ^{4/}	-	-	-	80
TOTAL QUANTITY	670	638	572	546
TOTAL VALUE (\$1,000)	633	684	624	608
BULK:				
Mexico	205	904	682	658
Nicaragua	75	91	83	93
Panama		17	334	487
Haiti	319	536	500	480
Dominican Republic	245	363	444	480
Bolivia	345	328	444	446
Argentina	143	-	-	-
Spain	84	959	1,323	1,204
Philippines, Republic of	171	1,430	520	917
Australia	1	-	267	1,185
Tangier	12	22	-	-
Other	74	30	47	293
Estimated Shipments ^{4/}	-	-	-	4
TOTAL QUANTITY	1,674	4,680	4,644	6,247
TOTAL VALUE (\$1,000)	1,288	3,726	3,357	4,924

Compiled from records of the Bureau of the Census in the Foreign Agricultural Service N.E. 1934-38 average not available for smoking tobacco in packages and bulk.

^{1/} Preliminary. ^{2/} West Germany. ^{3/} Class established January 1954.

^{4/} Estimated shipments are estimates based on 10 percent sample shipments valued \$100 - \$499. See Census Publication No. FT-410, Part 1, page 3, January - December 1954. ^{5/} Not listed separately in 1934, shown in "other tobacco manufactures." ^{6/} Snuff included 1948-1955. ^{7/} Prior to January 1, 1938, Panama Republic and Canal Zone were listed as "Panama." ^{8/} Not available.

United Kingdom Tobacco Situation

Imports of unmanufactured tobacco into the United Kingdom in 1955 totaled 343.8 million pounds compared with 311.7 million pounds in 1954. Most of the imports (91 percent) last year consisted of flue-cured tobacco from the United States and Commonwealth areas. The United States, the principal supplier, furnished 178.6 million pounds of tobacco. The United States' share in the British market last year was 52 percent compared with 51 percent in 1954 and 78 percent during 1934-38. About 22 million pounds of British imports from the United States in 1955 consisted of leaf shipped under the 1954-55 Public Law 480 program.

While the United States' share in the British market has declined drastically since the early post-war period, the share of the Commonwealth countries has increased greatly. In 1955, Commonwealth areas supplied 149.6 million pounds or 43.5 percent of total imports as compared with 40 percent in 1953 and with only about 20 percent in 1934-38. A combination of several factors has operated in recent years to reduce the share of the United States in the United Kingdom tobacco market as compared with prewar and early postwar periods. These factors include: (1) a purchase agreement between Southern Rhodesian tobacco growers and British manufacturers under which the manufacturers have agreed to purchase about two-thirds of the Rhodesian crop; (2) the policy of encouraging tobacco production in Commonwealth areas, which has been implemented by duty preferences on leaf grown in those areas; (3) admixture of a minimum of five percent oriental tobacco in cigarettes for the domestic market; (4) restrictions on imports of leaf tobacco from the "dollar" area--primarily the United States.

The dollar allocation system was made more flexible, however, in mid-1954. Under the arrangements now in effect, each manufacturer has agreed that not more than 61 percent of his overall usings of "light" tobacco (including oriental) in cigarettes produced for home consumption shall consist of tobaccos from the "dollar" area (United States and Canada). Manufacturers must plan their leaf purchases accordingly. This system has permitted some increase in both purchases and consumption of United States leaf. United Kingdom imports of United States tobacco, however, have exceeded consumption for three years in a row. The 1956 imports are not likely to reach the 1955 figure of 178.6 million pounds. Stocks of United States flue-cured leaf in Britain were about 50 million pounds greater on December 31, 1955 than on the corresponding date in 1953.

The United Kingdom is one of the world's largest exporters of tobacco products, principally cigarettes. Exports of cigarettes in 1955 totaled 41.6 million pounds, up 3.0 million pounds from the previous year. The principal market for cigarettes in 1955 included Singapore, 9.6 million pounds; Malaya, 6.7 million pounds; Gold Coast, 2.2 million pounds; and Australia, 1.8 million pounds.

Table 1 - United Kingdom: Imports of Unmanufactured tobacco, 1955
with comparisons (Dry weight)

Country	Average : 1934-38	: 1952	: 1953	: 1954	: 1955
	: 1,000	: 1,000	: 1,000	: 1,000	: 1,000
	: <u>pounds</u>	: <u>pounds</u>	: <u>pounds</u>	: <u>pounds</u>	: <u>pounds</u>
Southern Rhodesia	: 15,845	: 58,445	: 57,312	: 62,818	: 72,055
India	: 17,355	: 38,297	: 31,426	: 36,218	: 36,426
Canada	: 9,834	: 32,439	: 24,063	: 24,860	: 40,000
Nyasaland	: 12,510	: 11,826	: 10,933	: 13,969	: 2/
Other Commonwealth	: 1,531	: 2,434	: 3,186	: 1,582	: 1,091
Total Commonwealth	: 57,075	: 143,441	: 126,920	: 139,447	: 149,572
United States	: 213,017	: 66,840	: 174,161	: 159,667	: 178,603
Greece	: 563	: 1,170	: 767	: 1,445	: 1,452
Turkey	: 564	: 570	: 2,369	: 2,836	: 3,113
Netherlands 1/	: 1,040	: 9,088	: 9,672	: 6,765	: 7,526
Other	: 2,483	: 2,634	: 1,881	: 1,494	: 3,557
Total Foreign	: 217,667	: 80,302	: 188,850	: 172,207	: 194,251
Total all sources	: 274,742	: 223,743	: 315,770	: 311,654	: 343,823

1/ Re-exports of Indonesian and other leaf from the Netherlands. 2/ Included with So. Rhodesia. Compiled from Trade and Navigation of the United Kingdom and other official sources.

Table 2 - United States: Exports of unmanufactured tobacco to the
United Kingdom

Type	1954 1/	1955 1/
	Quantity	Quantity
	: 1,000	: 1,000
	: <u>pounds</u>	: <u>pounds</u>
		Value
		: 1,000
		: <u>dollars</u>
Flue-cured	: 148,162	: 128,033
Burley	: 237	: 169
Kentucky-Tennessee	: 411	: 504
Virginia fire-cured	: 167	: 355
Black Fat	: 7	: 23
Green River	: 967	: 549
Cigar Leaf	: 17	: 50
Perique	: 34	: 60
Stems, trimmings & scrap	: 14	: 5
Total	: 150,016	: 129,748

1/ Preliminary
Compiled from records of the Bureau of the Census

Official figures indicate that factory consumption of unmanufactured tobacco in 1955 in the United Kingdom amounted to some 300 million pounds, up about 10 million pounds from the previous year. This includes leaf for the manufacture for domestic consumption as well as the export trade. Factory consumption of U. S. flue-cured leaf exceeded the previous years level by about 5 million pounds, equal to one-half of the total increase in consumption of all tobaccos in 1955. On this basis, the United States fared somewhat better in British factory consumption in 1955 than in 1954, both in terms of absolute quantity and as a percentage of the total quantity used. This reversal of a long-term trend is significant; it may indicate that British manufacturers are finding it increasingly difficult to use a larger percentage of non-U. S. tobacco. However, increasing tobacco availabilities in Commonwealth producing areas may encourage greater use of these tobaccos.

United Kingdom: Estimated factory consumption of unmanufactured tobacco, average 1934-38; annual 1947-55 (British redried weight).

Year	Total Factory	Percent of Total			
	: Consumption	: United States	: Commonwealth	: All Other	
	: Million	: Percent	: Percent	: Percent	
	: pounds	:	:	:	
	:	:	:	:	
Av. 1934-38	: 232	: 78	: 20	: 2	
1947	: 292	: 79	: 20	: 1	
1948	: 272	: 72	: 25	: 3	
1949	: 271	: 64	: 31	: 5	
1950	: 272	: 58	: 37	: 5	
1951	: 288	: 54	: 42	: 4	
1952	: 280	: 52	: 44	: 4	
1953	: 283	: 50	: 46	: 4	
1954	: 290	: 49	: 47	: 4	
1955	: 300	: 49	: 47	: 4	
	:	:	:	:	

PHILIPPINE TOBACCO MARKET

Measures Restricting Imports

Prior to World War II, the Philippines provided the largest export outlet for United States cigarettes. This market took an average of 2.5 billion cigarettes during the period 1934-38, or more than one-half of the total cigarette exports from the United States. Immediately following the close of World War II, exports of United States cigarettes to the Philippines showed a phenomenal increase, and during the period 1946-48 averaged 10.1 billion pieces annually.

Leaf tobacco imports into the Philippines were relatively insignificant during the immediate prewar and early postwar years. Practically all the imports of foreign cigarettes and leaf originated in the United States. The drive toward self-sufficiency in tobacco in the Philippines began in 1949. It was aimed at conserving dollar exchange used in cigarette purchases, and providing increased employment for the domestic population in tobacco-manufacturing operations. Beginning in 1950, leaf tobacco has been far more important than cigarettes in Philippine import trade. Since 1949 a number of measures have been enacted by the Philippine Government to accelerate the movement toward the goal of self-sufficiency. These may be summarized briefly as follows:

- (a) In 1949 a substantial curtailment was made in the dollar allocations for cigarette imports, in order to utilize more fully the local labor supply and to conserve exchange by purchasing leaf tobacco instead of the relatively more expensive cigarettes.
- (b) In May 1952, Philippine Republic Act No. 698 was enacted making imports of unmanufactured tobacco (other than cigar leaf) subject to quota limitations. This was designed to reduce foreign exchange expenditures, and at the same time, encourage production of domestic light types of cigarette leaf. Under the act, quotas beginning with the year 1952 were established, using 1950 imports as the basis for determination. Quotas for 1952 were established at 75 percent of 1950 imports; for 1953, 50 percent; for 1954, 40 percent; and for succeeding years, only 25 percent. This quota system was implemented by the use of import permits and strict controls on foreign exchange for tobacco purchases.

It became obvious, however, by mid-1954 that the quota system would seriously affect the manufacture of tobacco products in the Philippines, since stocks of United States leaf were being rapidly depleted, and the deficiency in supplies could not be made up immediately by increasing domestic leaf production.

- (c) In July, 1954, therefore, certain amendments (Republic Act 1194) were enacted to Republic Act No. 698. These amendments retained

the previous provisions of law with respect to quotas on imports in 1954 and 1955, but further provided that quotas might be increased sufficiently to cover additional imports, which, when added to domestic leaf production, would ensure the manufacture of tobacco products at not less than the previous year's level. For 1956 and succeeding years, the amendments provided that imports of tobacco should be restricted to the quantity which, when added to the total domestic production, would be sufficient to maintain output of tobacco products at a level at least equal to the quantity produced in the preceding year.

Another amendment provided that all of the domestic crop of Virginia-type tobacco must be purchased by manufacturers, in accordance with a price-supporting schedule, either directly from farmers, or from the agricultural credit agency, (ACCFA), prior to the determination of a deficiency in local production. This schedule established minimum prices for flue-cured tobacco ranging from the equivalent of 34 U. S. cents per pound for the lowest grade, to 81 cents per pound for the best quality.

- (d) Under the terms of the revised Philippine Trade Act negotiated with the United States, duties on imports of United States leaf into the Philippines were established at 25 percent of the 1909 tariff rate for the years 1956-58. Progressive increases are to be made from time to time until 1974 when the full tariff rate, equivalent to U. S. \$1.85 per pound will go into effect. However, prior to January 1, 1956, Executive Order No. 150 was issued, increasing the base duty rate on imports of unmanufactured tobacco by 30 percent, thereby making the present effective rate on imports of United States leaf equivalent to about 60 U. S. cents per pound. This present tariff and the 17 percent temporary special import tax on the C.I.F. value, have about doubled the costs of imported leaf.

These restrictive measures on imports seriously affected the United States share of leaf tobacco used by the Philippine manufacturers in 1955. Prospects for 1956 appear to be quite unfavorable. The encouragement these measures have given to Philippine tobacco producers make it extremely difficult for United States tobacco exporters to maintain a market of any significance in the Philippines.

Leaf Production

Republic Act No. 1194 which limited imports of tobacco to the quantity needed to make up the deficiency in local production and established a price-support program for Virginia-types of tobacco is

chiefly responsible for the startling increase in production since 1954. The 1956 Virginia crop is estimated at 41.0 million pounds as compared with only 4.5 million pounds harvested from the 1953-54 crop. Production of native types of tobacco is declining, and these are being supplanted by Virginia types, chiefly because of the price support incentives for the latter.

Philippines: Area and production of tobacco: averages, 1935-39 and 1947-51; annual, 1953 through 1956 1/

Year of Harvest	Area	Production		
		Total	Native	Virginia <u>2/</u>
	1,000 acres	1,000 pounds	1,000 pounds	1,000 pounds
1935-39 Av.	176	82,292	81,950	342
1947-51 Av.	100	49,938	49,677	261
1953	97	49,449	46,100	3,349
1954	92	39,603	35,081	4,522
1955	107	56,244	41,188	15,056
1956 <u>3/</u>	155	80,750	39,750	41,000

1/ Farm-sales weight. 2/ Mainly flue-cured. 3/ Preliminary.

Further production increases in Virginia-types of tobacco can be expected in the future because of the various governmental programs aiming at self-sufficiency in flue-cured tobacco. The apparent objective is to limit imports to a small percentage of total requirements. Some quantities of United States leaf tobacco will be required for blending with domestic tobaccos in order to produce acceptable cigarettes.

Import of unmanufactured tobacco

The level of cigarette leaf imports is governed by ACCFA (the governmental agency that is required to purchase all remaining "Virginia" tobaccos not sold to domestic manufacturers). This agency reports to the President, not later than August 1 of each year, whether or not indigenous production of Virginia-type tobacco is sufficient to maintain the manufacture of tobacco products at not less than the quantity manufactured in the preceding fiscal year. Upon receipt of a deficiency report, the President of the Philippines may authorize imports of Virginia-type leaf tobacco to the extent that foreign exchange can be made available by the Central Bank.

The United States is the Philippines' main source of cigarette leaf tobacco. During the postwar years, the United States' share of the market has been almost 100 percent with the exception of three years when small quantities of leaf were imported from Indonesia, Greece and Turkey. Leaf imports from the United States have increased substantially from the prewar level. During the 1935-39 period, Philippine imports from the United States averaged 1.1 million pounds; for 1947-51, 7.9 million pounds; for 1952, 32.5 million pounds; for 1953, 25.5 million pounds; for 1954, 14.5 million pounds; and for 1955, an estimated 20 million pounds.

The predominating United States type of leaf imported by the Philippines has been flue-cured. Imports of flue-cured have comprised about 94 percent of the total since 1950. Imports of United States Burley during 1955 totaled about 1.1 million pounds, 0.2 million pounds larger than 1954, but slightly below the 1952 and 1953 shipments of about 1.2 million pounds. Imports of cigar leaf, mainly wrapper, totaled 71,000 pounds during 1955.

Imports of manufactured products

Imports of cigarettes, mainly from the United States, declined from the record high of 11.1 billion pieces in 1948 to 405 million in 1954, and further declines are anticipated. Imports of other manufactured tobacco products, though minor and mainly from the United States, continue the downward trend evident since 1948.

Exports of unmanufactured tobacco

Philippine leaf exports are increasing, but are still below prewar. Spain, the principal export outlet, has purchased about 75 percent of the total since 1950. Leaf exports during 1952-54 averaged about 25 million pounds as compared with an average of 37.3 million pounds exported during 1935-39. Countries increasing their takings of Philippine leaf include Indochina, Morocco, Belgium and the Netherlands.

Exports of manufactured products

Total exports of cigars averaged about 4.1 million pieces during 1951-54 as compared with 202 million pieces during 1935-39. The United States and Hong-Kong are the principal cigar export markets. Exports of other manufactured tobacco products are insignificant.

Consumption of Cigarette Leaf

Practically all imported leaf has been used in the manufacture of cigarettes. Since more than 90 percent of tobacco consumed in the Philippine Republic is in the form of cigarettes, trends in consumption of this tobacco are of great interest to the United States tobacco export industry.

Currently, consumption of cigarette leaf in the Philippines is about twice the level of 1937-41. It is estimated that total leaf consumed (domestic and U. S.) in the Philippines in 1955 in the form of cigarettes, amounted to about 44 million pounds, farm-sales weight, compared with about 23 million, on the average, during 1937-41. During the latter period, as well as for the period 1946-49, most of the tobacco consumed in cigarettes in the Philippines consisted of leaf imported in the form of cigarettes. A drastic reversal began in 1950, the year following the Philippine curtailment of cigarette imports. From that time imports of leaf tobacco have been far more important than the imports of cigarettes.

More than 70 percent of all tobacco consumed in cigarettes during the period 1946-49 was grown in the United States. As recently as 1953 the United States share was 77 percent, but the United States' share decreased to about 65 percent in 1954 and further to about 52 percent in 1955. For 1956, the United States' share is expected to fall substantially below that of last year. The following tabulation shows estimated consumption of cigarette tobaccos on a farm-sales-weight basis in the Philippines for a series of years.

Estimated Consumption of Cigarette Tobaccos in the Philippines by Source of Leaf

Average 1937-41, and annual 1946 through 1955, farm-sales weight

Year	Leaf in Cigarettes Manufactured in the Philippines	Leaf Tobacco Imported from U. S. as Manufactured	Total Leaf Used in Cigarettes	Percent U. S. Leaf is of Total	
	Domestic Leaf : Million Pounds	U.S. Leaf : Million Pounds	Cigarettes : Million Pounds	Cigarettes : Million Pounds	Percent
1937-41 Av.	10.6	1.3	11.5	23.4	55
1946	3.4	1/	27.5	30.9	89
1947	5.6	0	28.9	34.5	84
1948	5.4	.2	34.7	40.3	86
1949	4.5	1.1	22.3	27.8	84
1950	7.8	14.7	4.6	27.1	71
1951	8.2	18.8	3.6	30.6	73
1952	8.7	25.9	2.1	36.7	76
1953	9.4	30.6	1.3	41.3	77
1954	15.9	28.7	1.3	45.9	65
1955	21.1	22.0	.9	44.0	52

1/ 5,000 pounds flue-cured

Output of Tobacco Products

Output of cigarettes increased from an average of 3.1 billion pieces during 1937-41 to a record high of 14.9 billion in 1954. It is believed that the output declined to an estimated 14.3 billion in 1955. Although output of Virginia-type cigarettes increased substantially during the period 1951-54, dark-type native cigarettes increased at an even more rapid rate. Production of dark cigarettes is increasing primarily because of lower retail prices for such cigarettes, and smaller available supplies of light cigarette tobacco for use in Virginia-type blends.

Cigar output in the Philippines has declined drastically since prewar, and amounted to about one-fourth the prewar level during 1953 and 1954. Production of chewing tobacco continues upward; smoking tobacco has fluctuated during the postwar years at slightly below the prewar level of 0.4 million pounds.

Philippines: Output of tobacco products; averages, 1937-41 and 1947-51, annual, 1951 through 1955

Year	Cigarettes	Cigars	Smoking Tobacco	Chewing Tobacco
	: Million pieces	: Million pieces	: 1,000 pounds	: 1,000 pounds
1937-41 Average	: 3,137	: 313	: 425	: 363
1947-51 Average	: 1,868	: 58	: 222	: 230
1951	: 9,014	: 91	: 352	: 696
1952	: 11,538 1/2	: 86	: 355	: 509
1953	: 13,340 2/3	: 98	: 395	: 542
1954	: 14,850 3/4	: 88	: 390	: 529
1955 4/5	: 14,300 5/8	: 86	: 372	: 545

1/ 9,162 million were Virginia-type cigarettes

2/ 10,518 " " " " "

3/ 11,245 " " " " "

4/ Partially estimated by FAS

5/ Virginia-type cigarettes estimated between 10.5 and 10.8 billion

U. S. Competitive Position

The United States has been able to compete effectively with other tobacco-exporting countries in the Philippine market. On the other hand, despite an established preference for United States leaf, Philippine manufacturers are now restricted by law to purchase abroad only that portion of their requirements which can not be provided from domestic production. In such a situation, there can be no competition for that part of the Philippine market which can be supplied from the local crop. Under these circumstances, price and quality factors, which are usually important considerations, are ineffective. It is possible, however, that such an arbitrary method of controlling tobacco purchases eventually may be modified since a continuation of the present price-support system for Philippine Virginia-type tobacco, which operates with little regard to the quantity or quality of the crop, is not feasible economically over an extended period.

GERMAN CIGARETTE MARKET

Four outstanding features occurred in the German cigarette market during 1955 which have favorable implications for United States cigarette leaf tobacco. They are as follows:

- (a) cigarette output up 14.6 percent over the preceding year;
- (b) the sale of straight oriental cigarettes has ceased its rapid expansion;
- (c) filter-tip cigarettes, which contain a high percentage of United States leaf, increased significantly both in volume and as a percent of total output;
- (d) and the average price paid for United States leaf, as indicated by duty-paid imports, did not increase appreciably over the previous year as did oriental tobaccos.

Cigarette Output

Cigarette output during 1955 is expected to total about 45.6 billion pieces as compared with 39.8 billion in 1954. Output of cigarettes is likely to continue its upward trend at the expense of smoking tobaccos.

Western Germany: Output and per-capita consumption of cigarettes, 1950-55

Year	:	Output	:	Per Capita
	:		:	Consumption
	:	<u>Billion Pieces</u>	:	<u>Pieces</u>
	:		:	
1950	:	23.3	:	468
1951	:	27.4	:	546
1952	:	30.4	:	600
1953	:	35.8	:	700
1954	:	39.8	:	770
1955 <u>1/</u>	:	45.6	:	861
	:		:	

1/ Preliminary

Most of the increase in cigarette output occurred in the production of filter-tip cigarettes. Output of filter-tip cigarettes during 1955 was estimated at 4.7 billion pieces as compared with 2.2 billion during 1954. The output of Virginia blend (largely American-blended type) and oriental cigarettes each increased about 1.6 billion pieces over the previous year.

In the total aggregate, sales of American-blended type cigarettes continue to decline as a percent of total sales. Sales of filter-tip cigarettes during December 1955 represented about 14.3 percent of total sales and are expected to continue their upward trend.

Western Germany: Percentage of different types of cigarettes
in sales, 1935-39 average, 1951 through 1955

Type of Cigarette	1935-39 average	1951	1952	1953	1954	1955 ^{1/}
	percent	percent	percent	percent	percent	percent
Oriental	97.0	4.3	4.9	9.0	15.1	16.9
Filter	-	2.3	3.4	4.0	5.4	10.2
Dark	-	3.0	3.0	2.8	3.3	2.8
Virginia blend ^{2/}	3.0	90.4	88.7	84.2	76.2	70.1
Total	100.0	100.0	100.0	100.0	100.0	100.0

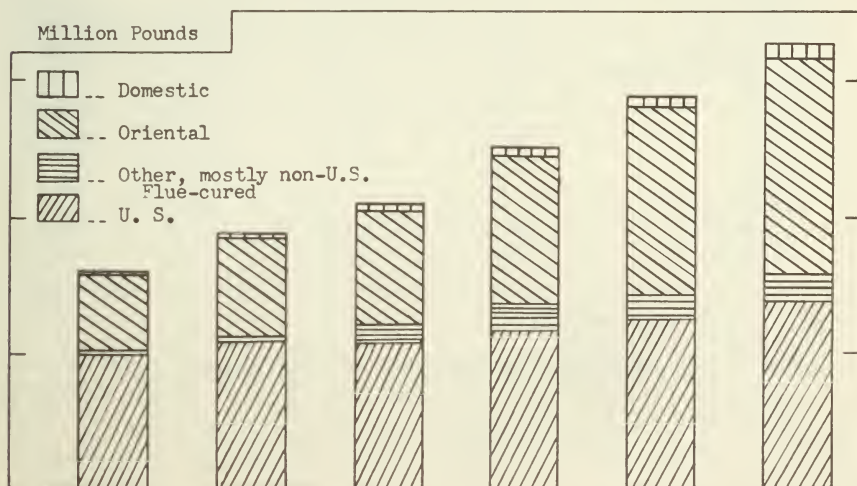
^{1/} Preliminary. ^{2/} Largely American-Blended type cigarettes, but includes small quantities of straight Virginia

Usings of Cigarette Leaf

Total usings of cigarette leaf during 1955 are estimated at 131.0 million pounds on a farm-sales-weight basis. Usings of United States cigarette leaf continued to increase slightly in absolute volume, but represented a declining proportion of total leaf usage. Usings of the United States leaf by cigarette manufacturers during 1955 represented about 43 percent of the total usings compared with about 62 percent during 1950.

GERMAN USINGS OF CIGARETTE LEAF TOBACCO

(Estimated factory usings on a farm-sales-weight basis, 1950-55)



Usings of oriental tobaccos in 1955 were about triple that of 1950 and represented about 48 percent of total usings by cigarette manufacturers. Usings of domestic and other imported tobacco, mainly non-U.S. flue-cured, accounted for about 9 percent in contrast to 4 percent during 1950.

Prices paid for United States leaf by German manufacturers, as indicated by duty-paid imports, did not advance in price during 1955 as did oriental leaf from Turkey, Greece, Yugoslavia and Bulgaria. The actual cost of oriental tobaccos from a number of areas differs greatly from the prices reported. This is due partly to existing trade arrangements fostered by Germany (particularly with oriental leaf producing countries for the purpose of expanding exports of German industrial goods), the availability of certain foreign currency at less than the official rates of exchange, and the purchase of discount notes from third countries at less than their face value. Prices paid for cigarette leaf from other sources, mainly non-U.S. flue-cured, in general have been well below those of United States. Leaf purchased from these areas is not comparable in quality and body to United States leaf, but is a neutral type filler.

Western Germany: Average prices paid for unmanufactured cigarette leaf tobaccos based on duty-paid imports in terms of U. S. cents per pound, 1952-55

Country of Origin	1952	1953	1954	1955 ^{1/}
United States	60.1	62.4	65.9	65.8
Turkey	47.5	50.8	57.0	59.3
Greece	56.7	51.8	53.4	58.9
Yugoslavia	40.2	37.4	42.4	45.4
Bulgaria	25.8	25.3	30.4	56.1
Soviet Union	-	-	50.8	53.8
Southern Rhodesia	47.2	43.6	33.6	36.4
Italy	35.6	55.6	35.0	36.1
India	36.7	34.1	39.8	25.8
Japan	46.1	44.3	42.4	42.1
China	44.2	39.0	37.1	35.2
Canada	-	-	-	49.1
Mozambique	-	-	28.7	23.2
Tanganyika	45.6	46.7	42.3	41.7
Colombia	25.9	28.8	26.0	25.5

^{1/} January-September only.

Source: Der Aussenhandel Der Bundesrepublik Deutschland.

U. S. Competitive Position

Competitive Position

U. S. exports in 1955 were about 19 percent above the 454 million pounds exported in 1954 and 28 percent above 1935-39. However, the long-term competitive position of U. S. tobacco in foreign markets is not encouraging as the U. S. is losing ground relatively in world markets. Increased U. S. exports in 1955 were due largely to sales for foreign currencies under the Public Law 480 program. High levels of economic activity, increased currency reserves, and relatively low stocks of tobacco abroad have, however, created recently an increasingly favorable climate for world trade in tobacco, and U. S. flue-cured and Burley tobaccos remain superior to those of all other countries. The most important hindrance to larger exports is the widespread and growing use of discriminatory trade barriers. The shortage of dollars in some importing countries, which has been a principal limiting factor, has been met in part by Public Law 480. Preferential import duties and higher U. S. prices for certain types and grades also restrict U. S. exports. These barriers can not be overcome solely by moderately lower U. S. leaf prices.

Competition Factors

Production in both competing exporting countries and importing countries, particularly of cigarette tobaccos such as flue-cured, Burley and oriental, continues to expand rapidly. Foreign production of flue-cured (major U. S. export type) totaled 1,212 million pounds in 1955 or three times the 1935-39 average and 55 percent above the 1947-51 level. Foreign Burley production increased from 23 million pounds prewar to 95 million in 1955. The Free World output of oriental (Turkish-type) leaf increased from an average of 344 million pounds in the prewar period to an average of 447 million in 1947-51 period, and to an all-time high of 575 million in 1955.

U. S. prices for better grades of flue-cured and Burley compare favorably with foreign prices. But prices for the lower and heavier grades, which are also exported in quantity, are now so high (due to increased U. S. demand for use in filter-tip cigarettes) that these grades face exclusion from a number of important export markets. The U. S. is not competitive pricewise with foreign dark tobaccos, especially for the very low grades. There is a relatively wide spread between the foreign and U. S. prices of the heavy types and low qualities of dark tobaccos. On these the U. S. is not able to compete because of higher production costs. In the past several years the relatively favorable level and stability of tobacco prices in the U. S. have contributed to increasing foreign tobacco production which is offering greater competition to our leaf.

Flue-cured

The U. S. has not shared proportionately in the substantial postwar increase in world consumption and trade in flue-cured leaf. Exports of U. S. flue-cured amounted to 375 million pounds in 1954, 20 percent over prewar (1935-39) but 3 percent below 1947-51. Many countries have recently increased output for domestic consumption but most of the increased competition is from larger exports by the Central African Federation (mainly Southern Rhodesia), Canada, and India.

U. S. flue-cured tobacco faces competition not only from foreign flue-cured, but also from the rising exports of oriental (Turkish-type) leaf -- largely from Turkey and Greece, and to some extent dark tobaccos from the Caribbean and South America.

Burley

Burley production continues to increase in important consuming countries, particularly Spain, Italy, Western Germany, and Mexico. Recent Italian exports have been fairly large. Competition is also increasing from several relatively small exporters (Canada, French Morocco, Central African Federation, and India) and from oriental and other light air-cured types substituted for Burley. If the recent increased prices for medium and heavier grades of U. S. Burley continue, it will be very difficult to maintain current U. S. exports.

Dark Fire-cured

The competitive position of U. S. fire-cured tobacco is very unfavorable and may deteriorate further. Nyasaland and Italy are the main competitors of the U. S. The demand for products in which this type of leaf is used continues to decline, and the prices of comparable fire-cured from other areas, especially Nyasaland, are well below those of U. S. leaf.

Dark Air-cured

U. S. exports of dark air-cured have been small and are likely to decline even further. Demand for this kind of tobacco is adversely affected by a long-term declining trend in consumption of smoking and chewing tobacco. The main competition comes from increased production in importing countries, and increased exports of air and sun-cured especially from the Caribbean and South America (mainly Cuba, Dominican Republic, Brazil, and Colombia).

UNITED STATES SHARE OF TOTAL TOBACCO IMPORTS IN IMPORTANT FOREIGN MARKETS

Western Europe

Western Europe bought only 42 percent of its tobacco from the U. S. in 1954 as compared with 50 percent in 1947-51. This market takes about 75 percent of all U. S. tobacco exports.

The decline has occurred chiefly because of: (1) larger supplies of cigarette tobaccos, especially from those exported from Rhodesia, India, Canada, Turkey and Greece; (2) preferential import duties; (3) discriminatory bilateral trading arrangements; and (4) increased domestic production in Western Europe.

United Kingdom

The U.S. share of our most important market, the United Kingdom, declined from 75 percent in 1935-39 to 51 percent in 1954. This decline was due mainly to increased shipments from Southern Rhodesia, India and Canada, because of preferential duties (about 21.5 cents less per pound), long-term guaranteed purchase agreements with Southern Rhodesia, the U. K. policy of limiting dollars for importing tobacco and to some extent, foreign prices that are lower than those for U. S. leaf. The U. S. share in the U. K. market is likely to continue to decline as output in Commonwealth areas increases further.

Western Germany

The U. S. now supplies a larger share of Western Germany's imports (now the U. S. second-largest customer) than before World War II. This share, however, has declined sharply from 54 percent in 1947-51 to 41 percent in 1954. Western Germany's output of flue-cured and Burley has increased greatly. But most of the decline in the U. S. share of total consumption has been due to increasing imports of oriental leaf from Greece and Turkey.

Netherlands

The U. S. share of imports by the Netherlands (third most important U. S. foreign customer) declined from 50.2 percent in 1947-51 period to 37 percent in 1953 and 1954. Most of this shift was due to increased imports of dark tobaccos from Indonesia and Brazil.

Australia

The U. S. share of Australia's tobacco imports (fourth largest U. S. market) declined from 97.7 percent prewar to 64.2 percent in 1954 as a result of increased competition from Southern Rhodesia and Canada. Lower prices and import duties for their leaf and the agreement guaranteeing purchases of Rhodesian tobacco are chiefly responsible for this shift.

Philippines

Since World War II, the Philippines has been the fifth largest importer of U. S. leaf. However, unless there is a change in Philippine tobacco legislation, imports from the U. S. will be drastically reduced in the future. This legislation provides that tobacco can only be imported if the Government issues a Certificate of Deficiency in domestic production.

The same legislation provides for very high price support levels on production of flue-cured leaf, and guarantees the purchase of total production regardless of quality. Largely because of these laws, output of flue-cured tobacco in the Philippines rose from 2.4 million pounds in 1953 to 15.5 million in 1955. The 1956 crop is estimated at 33 million pounds. The import duty of 60 cents per pound, which went into effect January 1, 1956, will also deter purchases from the U. S. The full duty rate of \$2.40 per pound will become effective progressively over the next few years.

Estimated production of flue-cured tobacco in specified countries, 1955 with comparisons

Country	Average 1935-39	Average 1947-51	1954	1955
	1,000	1,000	1,000	1,000
Free World (Excluding U. S.)	pounds	pounds	pounds	pounds
Central African Federation	28,390	91,065	133,165	131,824
Canada	54,616	111,646	173,159	121,600
India	26,900	64,510	130,000	119,000
All Other	136,669	260,475	452,131	524,539
Total Free World(Excl. U.S.)	246,575	527,696	888,455	896,963
United States	863,619	1,246,160	1,314,407	1,514,043
China 1/	150,900	250,000	300,000	315,000
TOTAL WORLD	1,261,094	2,023,856	2,502,862	2,726,006

1/ If recent reports from Communist China are accurate, output of flue-cured in recent years was substantially above these estimates.

Estimated production of Burley tobacco in specified countries, 1955 with comparisons

Country	Average 1935-39	Average 1947-51	1954	1955
	1,000	1,000	1,000	1,000
Free World (Excluding U. S.)	pounds	pounds	pounds	pounds
Canada	10,749	10,040	4,470	6,500
West Germany	-	5,500	12,967	16,225
Italy	4,600	13,700	15,300	15,432
Spain	3,000	6,425	19,581	31,969
French Morocco	500	878	3,748	3,086
India	-	1,640	2,240	2,200
Central African Federation	10	1,230	2,054	2,173
All Others	1,067	16,760	17,549	17,279
Total Free world(Excl. U.S.)	22,926	56,173	77,909	94,864
United States	315,826	552,736	667,172	506,990
TOTAL WORLD	338,752	608,909	745,081	601,854

Estimated production of Oriental tobacco in specified countries, 1955 with comparisons

Country	Average : 1935-39	Average : 1947-51	1954	1955
	1,000	1,000	1,000	1,000
Free World	pounds	pounds	pounds	pounds
Turkey	128,119	193,749	211,641	255,734
Greece	132,819	113,320	148,750	169,754
Yugoslavia	32,920	52,467	55,626	65,036
Italy	28,300	52,900	32,540	29,102
Iran	10,400	17,500	21,586	22,571
All Others	11,235	17,336	36,420	33,099
Total Free World	343,793	447,272	506,563	575,296
Soviet Bloc Countries	305,846	281,615	274,350	274,350
TOTAL WORLD	649,639	728,887	780,913	849,646

Percentage of U. S. tobacco imported by the five largest markets

Importing Country	Source	Average : 1935-39	Average : 1947-51	1953	1954
		Percent	Percent	Percent	Percent
United Kingdom	United States	74.6	57.4	55.2	51.1
	Southern Rhodesia	5.8	14.6	18.1	20.1
	India	7.3	11.2	10.0	11.6
	Canada	5.3	5.6	7.6	8.0
	Other	7.0	11.2	9.1	9.2
Western Germany	United States	6.7	53.8	43.1	40.7
	Greece	21.7	8.8	17.4	21.2
	Turkey	11.5	13.7	11.5	11.2
	Indonesia	23.3	2.9	5.5	6.1
	Brazil	13.5	8.5	8.8	8.1
	Other	23.3	12.3	13.7	12.7
Netherlands	United States	26.5	50.2	35.3	38.5
	Indonesia	39.3	8.0	11.8	19.3
	Brazil	14.1	8.8	9.3	13.8
	Other	20.1	33.0	43.6	28.4
Australia	United States	97.7	76.2	65.1	64.2
	Southern Rhodesia	.1	18.5	25.6	27.5
	Canada	-	1.6	6.8	6.0
	Other	2.2	3.7	2.5	2.3
Philippine Republic	United States	98.4	99.9	100.0	99.7
	Other	1.6	0.1	-	0.3

(PMGC)

Official Business

U. S. EXPORT ISSUE

This issue of the WORLD TOBACCO ANALYSIS is the first of a planned quarterly publication which will be based on statistical release dates of U. S. exports and estimated production first half year in March; world trade in May; estimated production, second half year in August; and estimated total world production in December.

This is a publication of the Tobacco Division of the Foreign Agricultural Service which administers the tobacco export programs of the Department of Agriculture and reports economic analyses of world markets and world production.

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March 21, 1956

MISCELLANEOUS TOBACCO DEVELOPMENTS

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Philippine Cigarette Consumption Declines in First Half 1955

Cigarette consumption (in the Philippine Republic) as indicated by sales of internal revenue stamps during the first half of 1955 totaled 7.5 billion pieces--down 3.6 percent from the 7.8 billion consumed during the comparable period in 1954. Consumption of cigars and smoking tobacco also declined 2.8 and 4.6 percent, respectively, while chewing tobacco increased 7.9 percent from the same 6 months of last year.

PHILIPPINE REPUBLIC: Consumption of tobacco products, as indicated by sales of internal revenue stamps, during January-June periods, 1954-55

Product	January-June 1954	January-June 1955
Cigarettes (Million pieces)	7,799	7,519
Cigars (Million pieces)	45.8	44.5
Smoking tobacco (1,000 lbs.)	194	185
Chewing tobacco (1,000 lbs.)	277	299

Source: Journal of Philippine Statistics, July-September 1955

Belgian Tobacco Usings Continue Downward

Total factory usings of unmanufactured tobacco in Belgium continued its gradual downward trend through the first 8 months of 1955. Usings in the production of cigars, cigarillos and cigarettes were 3.8, 5.8 and 2.4 percent, respectively, above the comparable period in 1954. However, leaf used in the production of smoking mixtures, chewing tobacco and snuff were 3.1, 31.5 and 47.5 percent, respectively, below January-August 1954. The total decline in output of the three latter products exceeded the increase that occurred in the production of the other products.

BELGIUM: Quantities of unmanufactured tobacco used in the production of tobacco products during the January-August periods, 1954-55

Product	January-August 1954	January-August 1955
	<u>1,000 pounds</u>	<u>1,000 pounds</u>
Cigars.....	966	1,003
Cigarillos.....	1,989	2,105
Cigarettes.....	16,305	16,695
Smoking Mixtures.....	15,351	14,881
Chewing Tobacco.....	95	66
Snuff.....	223	117
Total.....	34,929	34,867

Source: Bulletin De Statistique, October 1955

Western Germany's Tobacco Imports Up 12 Percent

Duty-paid imports of unmanufactured tobacco by Western German manufacturers during the first 9 months of 1955 totaled 108.4 million pounds -- up 12.2 percent from the 96.6 million pounds imported during the corresponding period of 1954. Most of the increase has occurred in larger takings of oriental tobaccos, principally from Greece.

Imports of oriental tobaccos, mainly from Turkey, Greece, Bulgaria, Yugoslavia and the Soviet Union totaled 39.3 million pounds during the first 9 months of 1955, compared with 31.7 million pounds during the same period last year.

Takings of United States leaf increased about 2.5 million pounds over the first 9 months of 1954. Total takings of non-U.S. flue-cured, mainly from Southern Rhodesia, Canada and Italy increased about 10 percent over the comparable period of 1954. Imports of cigar leaf, excluding takings from the United States, increased about 1 million pounds over the same period last year.

WESTERN GERMANY: Imports of duty-paid unmanufactured tobacco by country of origin during the January-September periods, 1954-55

Country of Origin	January-September 1954	January-September 1955
	<u>1,000 pounds</u>	
United States.....	40,351	42,835
Greece.....	20,471	25,597
Turkey.....	10,107	11,660
Indonesia.....	5,793	6,439
Brazil.....	7,755	7,790
Colombia.....	4,330	4,337
Dominican Republic.....	2,783	2,859
Italy.....	1,097	1,288
Southern Rhodesia.....	1,111	1,270
Soviet Union.....	345	540
Yugoslavia.....	692	757
Other.....	1,773	2,985
Total.....	96,608	108,357

Source: Der Aussenhandels Der Bundesrepublik Deutschland Teil 2, September 1955

Portugal's Tobacco Imports Slightly Lower

Portugal's imports of unmanufactured tobacco during January-September 1955 totaled 8.0 million pounds, slightly below the 8.1 million pounds imported during the corresponding period in 1954. Most of the decline occurred in reduced takings of Canadian and Indian leaf, presumably flue-cured. Imports of United States leaf were slightly above those for the first 9 months of the previous year.

PORTUGAL: Imports of unmanufactured tobacco, with comparisons

Country of Origin	January-September 1954	January-September 1955
	<u>1,000 pounds</u>	
United States.....	5,562	5,575
Central African Federation....	149	200
Brazil.....	79	64
Cuba.....	22	33
Greece.....	1,045	1,107
Italy.....	70	192
Angola.....	598	606
Mozambique.....	27	93
Other.....	584	135
Total.....	8,136	8,005

Source: Boletim Mensal do Instituto Nacional de Estatistica, September 1955.

Italian Tobacco Trade Increases

Italian imports of leaf tobacco during the January-September period of 1955 totaled 20.2 million pounds compared with 9.9 million pounds during the corresponding period of 1954. Most of the increase occurred in larger takings of United States, Bulgarian and Turkish leaf, whereas shipments from Greece declined considerably.

ITALY: Trade in leaf tobacco during the January-September periods, 1954-55

Country	Imports		Exports	
	1954	1955	1954	1955
	1,000	1,000	1,000	1,000
	pounds	pounds	pounds	pounds
Bulgaria.....	617	5,791	-	-
France.....	-	-	324	1,969
Western Germany..	-	-	1,756	3,296
Greece.....	4,539	2,458	-	-
Belgium.....	-	-	1,736	1/
Netherlands.....	-	-	1,705	2,056
Yugoslavia.....	3,307	1/	72	-
Switzerland.....	-	-	1,432	1,810
United Kingdom....	-	-	496	1/
Sweden.....	-	-	685	1/
Turkey.....	1,451	3,398	-	-
Soviet Union.....	-	-	1,113	2,876
United States....	4	5,272	852	895
Other.....	-	3,248	4,285	5,887
Total.....	9,918	20,167	14,456	18,789

1/ If any, included in other

Source: Statistica Del Commercio Con L'estero, September 1955

Exports of Italian leaf during the first 9 months of 1955 totaled 18.8 million pounds -- up 13 percent from the 14.5 million pounds exported during the comparable period of 1954. The Netherlands, France, Switzerland, Western Germany and the Soviet Union continued to increase their takings of Italian leaf, whereas shipments to Sweden, Belgium and the United Kingdom were sharply down as compared with January-September 1954.

Imports of cigarettes during the first 9 months of 1955 totaled 1.6 million pounds as compared with 0.8 million pounds last year. Most of the increase occurred in larger imports from the United States which accounted for 39 percent of the total, in contrast to only 7 percent last year. Imports from Switzerland, France and the United Kingdom were also slightly above the first 9 months of 1954.

Austrian Tobacco Imports Up 33.5 Percent

Imports of unmanufactured tobacco by the Austrian Tobacco Monopoly during the first 9 months of 1955 totaled 15.1 million pounds -- up 33.5 percent from the 11.3 million pounds imported during the corresponding period of 1954.

Most of the increase occurred in larger takings of United States, Turkish and Brazilian leaf. Also, there were slight increases in imports from other sources except Yugoslavia. New sources of leaf during January-September 1955 were obtained from Hungary and the Central African Federation.

Austria: Imports of unmanufactured tobacco during the January-September periods, 1954-55

Country of Origin	January-September	January-September
	1954	1955
	1,000 pounds	1,000 pounds
United States.....	3,904	5,562
Brazil.....	147	638
Turkey.....	1,564	3,297
Yugoslavia.....	992	-
Greece.....	2,881	2,920
Hungary.....	-	176
Bulgaria.....	1,102	1,415
India.....	638	770
Italy.....	14	18
Central Africa Federation.....	-	124
Indonesia.....	59	117
Other.....	2	52
Total.....	11,303	15,089

Source: Statistik des Aussenhandels Osterreichs, Erstes bis drittes Vierteljahr 1955

Larger Rhodesian Flue-cured Crop Expected in 1956

Preliminary reports indicate that flue-cured tobacco production in the Central African Federation will be about 158 million pounds in 1956 or 27 million pounds more than in 1955. However, production of dark tobaccos, especially fire-cured, in 1956 is expected to decline to about 13.7 million pounds or 9 percent below the 1955 level.

Rhodesian farmers are speeding up curing of flue-cured tobacco by injecting steam into barns to raise temperatures quickly to 100° Fahrenheit for coloring the leaf. This rapid temperature rise also reduces the development of barn spot. Faster curing is of extreme importance in Rhodesia as the shortage of curing barns is a major factor limiting flue-cured production.

Farmers there are also feeling the effects of rising operating costs. The major operating expenses reported to be increasing in recent years are wages, fertilizer, fuel and maintenance costs.

Pakistan Expects Larger Tobacco Crop in 1956

Tobacco production in Pakistan is expected to increase from 200 million pounds harvested in 1955 from 197 thousand acres to 211 million pounds in 1956 from 207 thousand acres. Production of flue-cured tobacco is expected to increase from 8 million pounds in 1955 to 10 million pounds in 1956, a rise of about 25 percent.

Flue-cured tobacco production in the Northwest Frontier Province is threatened by a disease which damages the roots with an effect similar to root rot. At present, only flue-cured varieties are being attacked; *Nicotiana Rustica* or *Desi* types appear to be immune.

Production of cigarettes continues to increase with an output of 5.3 billion in 1955 compared with 4.5 billion in 1954 with further expansion expected in 1956 as shortages occurred periodically during the past year. New machinery and plant capacity for increasing cigarette output will be brought into production this year.

West German Output of Oriental and Filter-Tip Cigarettes Continues Upward

According to information contained in *Die Tabak-Zeitung* (Tobacco Gazette-Mainz) of January 20, the output of oriental and filter-tip cigarettes represented 17.7 and 14.3 percent, respectively, of the total output during the month of December, 1955. The output of these types of cigarettes has been increasing steadily since 1951.

West Germany: Percent Oriental and filter-tip cigarettes represent of the total monthly output, 1954 and 1955.

Month	Oriental-type		Filter-tip	
	1954	1955	1954	1955
	Percent	Percent	Percent	Percent
January	14.3	16.1	4.6	7.2
February	14.5	16.5	4.8	7.6
March	14.6	16.7	5.2	8.5
April	15.4	17.1	5.0	8.4
May	15.1	17.1	5.0	8.6
June	15.5	17.1	5.0	9.1
July	15.5	17.0	5.2	9.7
August	15.1	16.9	5.4	10.0
September	14.7	17.0	5.6	10.9
October	14.9	17.0	6.2	12.6
November	15.2	16.9	6.2	14.0
December	16.1	17.7	6.4	14.3

Philippine Legislation Proposes National Cigar Factory

A bill has been introduced into the Philippine House of Representatives to establish a National Cigar Factory, according to a recent report. The purpose is to establish a factory for the machine manufacture of cigars primarily for export to the United States, and for domestic consumption by low-income consumers.

The bill also establishes a minimum price that may be paid for native cigar tobacco. This price is 25 centavos per kilogram (about 5.7 U.S. cents per pound) for the lowest quality, with no other grades or qualities mentioned. The authorized capitalization is to be 20 million pesos (U.S. \$10 million) of which 9.8 million is to be appropriated from the general fund for financing the 49 percent of the stock owned by the government.

To finance this factory, it is proposed that 51 percent of the stock must be subscribed by farmers cooperative associations, through their national organization the Central Cooperative Exchange, that are affiliated with the Agricultural Credit and Cooperative Financing Administration (ACCFA). If local cooperatives do not have sufficient funds to subscribe to this amount of stock, the bill provides that the Philippine National Bank be required to loan them the necessary additional capital. The remaining 49 percent of the capital must be subscribed by the National Government through ACCFA.

Under the new Philippine Trade Agreement with the United States, a base quota of 200 million cigars, decreasing over a period of years, is provided for entry into the United States, duty-free. If the Philippine Republic is able to fill this quota, it would provide a substantial source of dollar earnings. The redevelopment of the United States' market to the prewar levels presents a difficult problem in view of consumer preference for established United States brands of cigars.

The pending legislation, if supported by native and flue-cured tobacco interests, could possibly over-ride the strong labor opposition. Labor unions strongly opposed mechanization in the tobacco manufacturing industry and have been successful in the past in preventing mechanization of the cigar industry. Also, the flue-cured producers are apprehensive regarding the proposed bill because they fear that additional government programs for tobacco might become so burdensome as to endanger their present preferred position. However, if a price support program of any magnitude were included in the proposed legislation, the flue-cured producers' support could be readily mustered.

Italian Tobacco Consumption Up

Italian consumption of tobacco products, as indicated by monopoly sales, during 1955 totaled 102.7 million pounds, an increase of 3.7 percent from the 99.0 million pounds consumed in 1954. Consumption of cigarettes and cut tobacco continued their upward trends at the expense of cigars, cigarillos and snuff. Cigarette consumption increased 4.7 percent over the preceding year and represented 83.4 percent of total monopoly sales in contrast to 82.5 percent during 1954. Consumption of cigars and cigarillos continued a decline that has been evident since 1946 when sales totaled slightly over 7 million pounds. Consumption of cut tobacco and snuff since 1947 has been relatively constant, fluctuating annually between 12-13 million pounds.

ITALY: Consumption of tobacco products, as indicated by monopoly sales, during 1955, with comparisons

Product	:	1953	:	1954	:	1955
	:	1,000	:	1,000	:	1,000
	:	<u>pounds</u>	:	<u>pounds</u>	:	<u>pounds</u>
Cigarettes.....	:	77,246	:	81,722	:	85,589
Cigars and cigarillos..	:	5,109	:	4,625	:	4,236
Other manufactured 1/	:	12,332	:	12,661	:	12,849
Total.....	:	94,687	:	99,008	:	102,674

1/ Includes cut tobacco and snuff.

Source: Bollettino Mensile di Statistica, November 1955, and Notiziario, December 1955.

Yugoslav Tobacco Crop Record High

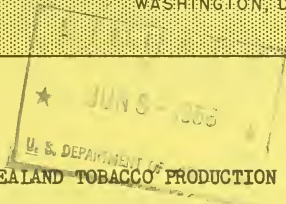
According to information contained in Tobacco (a monthly trade journal published in the United Kingdom) of February 1956, the 1955 Yugoslav tobacco crop was estimated at 94.8 million pounds, an all-time record high. This crop compares with the 1954 harvest of 64.4 million pounds, 1947-51 annual average of 59.6 million, and the 1935-39 annual average of 37.4 million pounds.

The quality of the 1955 harvest is slightly below that of the previous year due to excessive rainfall during the growing season. However, Yugoslavia expects to export about 33 million pounds of the 1955 crop, and if facilities for curing and storage can be increased, the total quantity exported may exceed their present estimate, according to trade sources.



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NEW ZEALAND TOBACCO PRODUCTION AND TRADE

Summary

Prospects for exports of United States' leaf tobacco to New Zealand appear quite favorable. Imports of leaf have been increasing, reaching an all-time high of about 7.6 million pounds in 1955 using United States' exports to the country as a basis. United States' leaf, which is preferred, accounts for practically all of the imports and this is likely to continue as long as New Zealand's export trade, particularly with the United States, is maintained at satisfactory levels, providing the dollars needed. This upward trend is expected to continue as population and incomes increase.

Imported leaf with aroma and flavor is necessary for blending with the neutral domestic tobaccos in order to produce the kind of cigarette demanded by New Zealand smokers. Domestic manufacture of cigarettes and other tobacco products has increased steadily in recent years, with cigarettes reaching almost two billion pieces in 1953-54 and output of other products exceeding 5.5 million pounds in the same period.

Imports of both leaf and manufactured products are controlled by legislation to protect the local industry. The United Kingdom supplies nearly all of the tobacco products imported, with the United States supplying only small quantities of cigarettes and other products.

Manufacturers have agreed to purchase domestic leaf, if available, for at least 32.5 percent of their total usings. Factory and government officials have indicated that they recognize that a "mandatory" increase in this percentage would probably be contrary to the intent of The General Agreement on Tariff and Trade. Actually, all domestic leaf of acceptable quality is utilized.

Introduction

Imports of unmanufactured tobacco and products, as well as domestic production, are, for all practical purposes, under the control of a Tobacco Board. This Board operates as guardian of the domestic tobacco farmer and processor by maintaining a close check on imported leaf and products. It is

composed of four producers, four manufacturers, and a chairman from the Department of Agriculture. All tobacco growers, who can obtain contracts with manufacturers, are licensed to produce by the Board and thereby are provided free entry into the ranks of producers insofar as the Board is concerned. The recommendations of the Tobacco Board are usually accepted in establishing minimum average prices paid to farmers, but the final responsibility rests with the Price Tribunal (Courts) and the Price Division of the Department of Commerce and Industry.

Production of Unmanufactured Leaf

More than 99 percent of domestic production is flue-cured tobacco and the remainder is Burley. The flue-cured has good color, texture and body, but tends to be neutral in aroma and flavor, although it is better in this respect than most flue-cured grown in the Far East.

New Zealand: Acreage, yield and production of tobacco by type, average 1947-51, annual 1952-56 - farm sales weight

Year	:	:	Yield	:	Production				
Harvested:	Acreage	:	per acre	:	Total	:	Flue-cured	:	Burley
:	<u>Acres</u>	:	<u>Pounds</u>	:	<u>1,000</u>	:	<u>1,000</u>	:	<u>1,000</u>
:		:		:	<u>pounds</u>	:	<u>pounds</u>	:	<u>pounds</u>
Average:	:	:	:	:	:	:	:	:	:
1947-51	4,064	:	1,212	:	4,925	:	4,744	:	181
Annual:	:	:	:	:	:	:	:	:	:
1952	3,648	:	1,121	:	4,088	:	4,035	:	53
1953	3,514	:	1,362	:	4,797	:	4,772	:	25
1954	3,212	:	1,311	:	4,229	:	4,218	:	11
1955	3,007	:	1,375	:	4,135	:	4,052	:	83
1956 $\frac{1}{2}$	3,020	:	1,369	:	4,300	:	4,214	:	86
:	:	:	:	:	:	:	:	:	:

1/ Estimate.

Source: Annual Reports and Statement of Accounts of the New Zealand Tobacco Board and Tobacco Intelligence Supplement, London, England.

Tobacco acreage varies from 1 to 50 acres with an average of about 8 acres per farm. A considerable amount of hired labor is used, with seasonal workers doing much of the harvesting and grading. A Crop Insurance Program, administered by the Tobacco Board, protects the growers from losses by hail, floods, and frost (up to March 31, by which time the crop is usually harvested).

The acreage planted to tobacco has been decreasing since the peak of 4,393 acres planted in 1948-49. The 1954-55 planting was 3,007 acres, 205 less than in 1953-54 and 507 less than in 1952-53. The Government and the Tobacco Board are concerned about the steady decline in tobacco acreage caused by competition from other types of farming that return nearly as much as tobacco. Alternative crops or livestock, which require less hired or seasonal labor and crops that are less susceptible to weather risks, such as wind and hail, are especially attractive to tobacco growers. In the 1953-54 season there were 401 growers compared with 429 the previous year and an average of 619 during 1948-49.

Labor is relatively scarce and the economy of New Zealand can be described as currently in a period of overemployment. It is very difficult to secure hired workers for employment on tobacco farms as returns per hour of labor are greater in industry and in many other crop and livestock enterprises than in tobacco.

Experiments indicate there is only a relatively small area of soils suitable for production of acceptable cigarette tobaccos. Most of the tobacco is grown on the South Island near Nelson in a lowland pocket surrounded by hills. In this area, there is keen competition for land, especially for the production of edible peas, chiefly for quick freezing. In many areas, tobacco plants in the field are subject to severe wind damage and in other areas, deposits from salt-laden ocean winds adversely affect burning quality of the leaf produced.

Production in 1956 is estimated at 4.3 million pounds - 4.9 percent above the 4.1 million produced in 1955, but 12.7 percent below the 1947-51 average. Acreage has declined from an average of 4,064 in 1947-51 to 3,007 in 1956 - a drop of 26 percent. Production has not declined proportionately as yields per acre are higher now than the average during the early postwar years.

Seedbeds are started in August, (mostly by manufacturing companies) and the small seedlings are issued or sold to growers about the last week in September, while the plants are still quite small. Production in New Zealand appears to be unique in one respect - that is, instead of these small seedlings being transplanted directly to the fields, they are set in boxes. (about 1,500 plants per box) where they remain until the latter part of October or early November, at which time they are transplanted to the fields. Harvesting begins in January and most of the crop is in by April 1.

Prices

The New Zealand Government, on the recommendation of the Tobacco Board, fixes a minimum and a basic average price each year for New Zealand flue-cured and Burley tobacco, which is supposed to reflect changes in the cost of production, together with other market factors. The minimum price, regardless of quality, is equivalent to 21 U.S. cents per pound. Average prices are not set by grades, but manufacturers post their prices by grades. Manufacturers who purchase tobacco quote prices by grades on a scale which will, as nearly as feasible, return the basic average price established. Prices of manufactured tobacco products are also set by government price control authorities.

The basic average prices for leaf harvested in 1955 were equivalent to 55.97 U.S. cents per pound for flue-cured and 51.01 cents for Burley, representing an increase over the previous year of 1.75 cents per pound for flue-cured and 0.29 cents for Burley. Since 1950, there has been a steady rise in the average prices paid to growers, and it is believed that the prices will increase slightly again next season, as rising wage rates continue to increase production costs.

New Zealand: Average prices received per pound by farmers, calendar years 1947-55

Year	Flue-cured	Burley	Year	Flue-cured	Burley
	U.S. cents 1/	U.S. cents 1/		U.S. cents 1/	U.S. cents 1/
1947	34.99	30.95	1952	45.18	41.68
1948	49.15	44.15	1953	49.56	46.06
1949	2/	2/	1954	54.22	50.72
1950	37.31	33.81	1955	55.97	51.01
1951	41.98	38.48			

1/ New Zealand currency is converted to U.S. cents on the basis of U.S. \$2.80 per N.Z. £ for 1950-55, \$4.00 for 1948, \$3.23 for 1947.

2/ Not available.

Source: Annual Report and Statement of Accounts of New Zealand Tobacco Board and Tobacco Intelligence Supplement, London, England.

Tobacco Marketing

Leaf is baled and delivered by farmers to the central receiving station at Montueka. There is only one redrying plant owned by one of the tobacco manufacturers; however, tobacco purchased by the other companies is redried on a custom basis. The purchasing season usually extends from April 1 until about the end of July.

Imports of Unmanufactured Tobacco

Imported tobacco is required for blending with domestic leaf in order to produce cigarettes with the flavor and aroma desired by New Zealand smokers. The import demand for cigarette leaf is for very high quality, colory grades with good body, flavor and aroma. Practically all of the tobacco imported is supplied by the United States. Imports of unmanufactured tobacco reached a record level of about 7.6 million pounds in 1955, or about 5 percent above the 7.3 million pounds imported in 1954, and almost 50 percent above the 5.1 million pounds imported in 1953. Approximately 95 percent of imported leaf tobacco is flue-cured with fire-cured ranking second in importance. Imports of U.S. fire-cured have been surprisingly stable over the last 20 years. However, the 416,000 pounds of United States fire-cured exported to New Zealand during 1955 was the largest amount in many years. United States' shipments of Kentucky-Tennessee fire-cured have risen sharply over the last 10-year period, most of it in the high-quality grades.

New Zealand: Imports of leaf and manufactured tobacco by kind and principal countries of origin; average 1947-51, annual 1952-54

Kind and country of origin	Average 1947-51	1952	1953	1954
	1,000	1,000	1,000	1,000
	pounds	pounds	pounds	pounds
<u>Leaf:</u>				
United States	5,397	6,742	5,139	7,140 1/
Other	14	22	1	2/
Total	5,411	6,764	5,140	7,339
<u>Cigarettes: 3/</u>				
United Kingdom	722	575	189	2/
Switzerland	-	26	41	2/
United States	3/	1.2	1	2/
Other	236	12	25	2/
Total	958	614	256	342
<u>Cigars:</u>				
United Kingdom	4/	-	41	2/
British West Indies	4/	4	11	2/
Other	1	9	9	2/
Total	1	13	61	2/
<u>Other Manufactured:</u>				
United Kingdom	106	2	17	2/
Union of South Africa	6	38	1	2/
Other	9	9	12	2/
Total	121	49	30	52 5/

1/ U. S. exports. 2/ Not available. 3/ Partly converted from pieces at rate of 2.5 pounds per 1,000 pieces. 4/ Less than 500 pounds. 5/ Includes cigars.

Source: Statistical report on Trade and Shipping of New Zealand and reports from Agricultural Attaches and other U.S. representatives abroad.

Exports of Manufactured Tobacco

New Zealand exports small quantities of manufactured tobacco products, primarily cigarettes and cut tobacco, and most of these are sent to the nearby Pacific Islands. An important part of the exports are reported to be used in ship's stores.

New Zealand: Exports of manufactured tobacco by kind, calendar years 1947-54

Kind	: 1947	: 1948	: 1949	: 1950	: 1951	: 1952	: 1953	: 1954	1/
	: 1,000	: 1,000	: 1,000	: 1,000	: 1,000	: 1,000	: 1,000	: 1,000	
	: pounds	: pounds	: pounds	: pounds	: pounds	: pounds	: pounds	: pounds	
Cigarettes	: 74	: 62	: 44	: 53	: 58	: 49	: 165	: 201	
Other manufactured	: :	: :	: :	: :	: :	: :	: :	: :	
tobacco 2/	: 88	: 65	: 101	: 83	: 88	: 139	: 152	: 36	
	: :	: :	: :	: :	: :	: :	: :	: :	

1/ First nine months only. 2/ Primarily cut tobacco.

Source: External Trade of New Zealand.

Utilization of Leaf

In 1953-54, a total of 10.7 million pounds of leaf was used. This was approximately 4 percent greater than in 1952-53, 4.2 percent more than in 1951-52, and 22 percent above the 1947-51 average.

New Zealand: Utilization of leaf tobacco, 1946-47 to 1953-54 (year ending July 31)

Year	: Quantity	::	Year	: Quantity
	: 1,000 pounds	::		: 1,000 pounds
1946-47	: 7,725	::	1950-51	: 9,681
1947-48	: 7,949	::	1951-52	: 10,257
1948-49	: 9,024	::	1952-53	: 10,268
1949-50	: 9,455	::	1953-54	: 10,688
	: :	::		: :

Source: Department of Census and Statistics of New Zealand.

Rising consumption of tobacco together with declining domestic production and an established preference for United States tobacco should insure a continuing market for it.

Domestic production of cigarettes and cut tobacco has increased steadily. The 1953-54 output of 1,994 million cigarettes and 5.6 million pounds of cut tobacco are 3.6 percent and 5 percent higher, respectively, than the previous year, and 34.6 percent and 21 percent higher, respectively, than the 1947-51 averages.

New Zealand: Production of manufactured products by kind, 1946-47 to 1953-54 (year ending July 31)

Year	Cigarettes	Other tobacco products 1/	Year	Cigarettes	Other tobacco products 1/
	Million pieces	1,000 pounds		Million pieces	1,000 pounds
1946-47:	1,238.9	3,866	1950-51:	1,722.5	5,158
1947-48:	1,353.9	4,027	1951-52:	1,885.3	5,304
1948-49:	1,445.3	4,928	1952-53:	1,925.0	5,290
1949-50:	1,647.7	4,963	1953-54:	1,994.0	5,553

1/ Includes all tobacco products other than cigarettes, but is mostly smoking mixtures and cut tobacco for use in making hand-rolled cigarettes. Source: Department of Census and Statistics, New Zealand.

Per capita consumption of tobacco in New Zealand increased greatly from the end of World War II until 1952; since then, it has remained relatively constant.

Year	Per capita consumption 1/
	pounds
1950	4.92
1951	5.03
1952	5.24
1953	5.21
1954	5.22 (estimated)
1955	5.24 (estimated)

1/ Based on withdrawals of all kinds of tobacco from bond for consumption during the year.

Production Research

A tobacco research station has been established in the producing area by the Department of Scientific and Industrial Research. Work is chiefly concentrated on seed production, variety studies, improved methods of harvesting and the curing and storing of leaf. At the Cawthron Institute at Nelson (a supposedly privately endowed institution), research is also being conducted with respect to fertilizers, soils, diseases, insects and nutrition of tobacco. The research program is approved by a committee made up of the director of the government research station, director of Cawthron Institute, two growers, two manufacturers and one representative of the Department of Agriculture. Half of the funds for tobacco research are from direct government appropriations, and half are secured by assessing each pound of leaf sold by producers.

A notable feature of the 1954-55 crop was the increase in the area planted to Virginia Gold variety. This variety, because of its resistance to black root-rot, is proving a valuable addition to the industry.

Extensive trial uses of Methyl Bromide for control of weeds in seedbeds on a commercial scale have been carried out and this method may eventually supersede the steam sterilization method.

New Zealand is free from most of the diseases from which tobacco crop may suffer. The most serious trouble in New Zealand is mosaic. The late plantings may suffer from "bronzing" - - that is, the leaves turn dark red due to cold weather, which is not quite cold enough to result in frost damage.



FOREIGN AGRICULTURE CIRCULAR

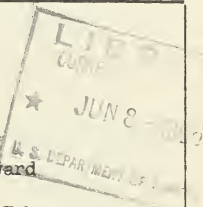
UNITED STATES DEPARTMENT OF AGRICULTURE
FOREIGN AGRICULTURAL SERVICE
WASHINGTON, D. C.

FT 7-56

May 1, 1956

MISCELLANEOUS TOBACCO DEVELOPMENTS

Australia Expands Tobacco Research
Canadian Burley Tobacco Acreage Up 20 Percent
Jamaica Plans to Produce More Tobacco
French Tobacco Imports Down 12.6 Million Pounds
Greek Tobacco Exports Record High
Turkish Tobacco Exports Down 9.7 Million Pounds
U. K. Consumption of Tobacco Products Continues Upward
Canadian Tobacco Exports Up 16.3 Million Pounds
Renewed Cuban-West German Trade Agreement Includes Tobacco
Denmark's Leaf Tobacco Imports Down 2.6 Million Pounds
Barn Rot Reducing Southern Rhodesia's 1956 Flue-cured Crop
Central African Federation Tobacco Exports Down 8.2 Million Pounds
Netherlands Tobacco Imports Down 24.1 Million Pounds



Australia Expands Tobacco Research

The Australian Tobacco Advisory Committee reached an agreement for an expanded tobacco research and advisory service program at a meeting in Canberra on December 6. The purpose of this meeting was to discuss the allocation of funds which would be available in the Tobacco Industry Trust Account. The source of the trust account funds would be contributed by tobacco manufacturers, tobacco growers, and the Australian Government under legislation passed during the last session of Parliament. The trust account will be administered by the Minister for Commerce and Agriculture.

The Australian Government has appropriated £84,000 (about U. S. \$188,000) to the trust account and the tobacco manufacturers also have agreed to provide £84,000. These monies will be used for the establishment of a new tobacco research station for the Commonwealth Scientific and Industrial Organization in the Mareeba Dimbulah Area in North Queensland and for enlarging and improving the facilities available at 6 state experiment stations. In addition, growers, manufacturers, and the Federal Government have agreed to give annually at least £63,000 (about U.S. \$141,000) for maintenance and operational costs of the work to be conducted at these stations.

Canadian Burley Tobacco Acreage Up 20 Percent

The Burley Tobacco Marketing Association of Ontario has increased the allotted acreage for the 1956 Burley crop by 20 percent for a total of 6,376 acres as compared with the 1955 area of 5,314 acres. The 1956 forecast of production is placed at 7.5 million pounds or about 1.0 million pounds above the 1955 crop.

The basic price of 30 Canadian cents per pound was paid for the 1955 Burley crop or about the same as paid for the 1954 crop. The 1956 market price for Burley will not be set until the crop is harvested.

The average Burley acreage per farm in 1955 was 1.84 acres with an average return of about \$504 Canadian per acre to growers, which was the highest return in 20 years. The high yield enhance the return because about 75 percent of the entire crop was produced from Burley No. 1, which is a high-yielding and rootrot-resistant variety. Expanding production of light, cigarette-type Burley is expected to furnish increasing competition to United States leaf in foreign markets.

Jamaica Plans to Produce More Tobacco

According to the Commonwealth Producer (a journal published in the United Kingdom) of January-February 1956, the Jamaica Tobacco Company is planning to undertake an extensive tobacco growing project with an initial production of about 2.0 million pounds of leaf. The company has acquired 20,000 acres in the Manchester Area and has options on additional land for the production of tobacco. The plowing and mechanical equipment will be provided by the company and the entire enterprise will be closely supervised by the company's field staff. Also, overhead irrigation will be used making it possible to harvest two crops a year.

French Tobacco Imports Down 12.6 Million Pounds

Imports of unmanufactured tobacco by the French Tobacco Monopoly during 1955 totaled 85.8 million pounds, 12.6 million pounds below the postwar high of 98.3 million pounds in 1954. Most of the decline occurred in reduced takings from the United States, Greece and the French Overseas Territories. Imports from the overseas territories declined 12.1 million pounds from the 1954 level of 45.8 million pounds, while takings from the United States and Greece declined 3.6 and 6.1 million pounds, respectively.

Greek Tobacco Exports Record High

Greek exports of unmanufactured tobacco during 1955 totaled 121.3 million pounds, 5.6 million pounds greater than in 1954, establishing a new record high. Shipments to Western Germany, the principal market, totaled 41.7 million pounds - a record high, excluding the 1938 figure of 56.9 million pounds. Most of the increase in Greece's total exports occurred in larger shipments to the United States, 22.7 million pounds, which were 8.3 million pounds greater than in 1954 and higher than in any previous postwar year.

GREECE: Exports of unmanufactured tobacco by country of destination during 1955, with comparisons

Country of Destination	1953	1954	1955 1/
	<u>1,000 pounds</u>	<u>1,000 pounds</u>	<u>1,000 pounds</u>
United States.....	13,276	14,301	22,650
Western Germany.....	34,767	37,943	41,739
Eastern Germany.....	4,123	6,451	2,552
Soviet Union.....	4,879	8,214	1,426
Hungary.....	4,226	2,355	3,937
Poland.....	441	748	2/
Egypt.....	4,030	2,833	3,637
United Kingdom.....	3,845	2,476	2,760
Austria.....	6,797	6,781	5,834
Belgium.....	642	922	3,362
France.....	9,808	10,628	13,333
Switzerland.....	2,222	2,864	3,483
Italy.....	3,499	9,497	7,936
Netherlands.....	697	313	1,326
Sweden.....	2,006	1,045	1,021
Portugal.....	1,680	1,239	1,251
Finland.....	1,984	4,204	2,864
Others.....	9,011	2,813	2,162
Total.....	107,933	115,627	121,273

1/ Preliminary.

2/ If any, included in others.

Exports to France, Hungary, Belgium, Switzerland, and the Netherlands expanded sharply in 1955 with moderate increases noted for Egypt, Portugal, and the United Kingdom. At the same time, consignments to the Soviet Union and Eastern European countries were 9.8 million pounds less than in 1954, despite the increase of 1.6 million pounds to Hungary.

Greek tobacco exports to the Soviet Bloc countries during 1953-55 totaled 13.7, 17.8, and 8.0 million pounds, respectively. Countries which reduced their takings of Greek leaf in 1955 include Eastern Germany, Poland, Austria, Italy, Sweden, Finland, and the Soviet Union. About 70 percent of total Greek tobacco exports have been aided by various trade arrangements such as bilateral, and trade and payments agreements.

Turkish Tobacco Exports Down 9.7 Million Pounds

Exports of Turkish unmanufactured tobacco in 1955 showed a further decline to 132.3 million pounds - 9.8 million pounds less than in 1954 and 25.8 million pounds below the 1953 record high of 158.1 million pounds - due mainly to reduced shipments to the United States. However, shipments to the Soviet Bloc are increasing sharply and amounted to 8.0, 24.9, and 33.8 million pounds, respectively, during the last 3 years. Tobacco shipped to the Soviet Bloc and some European countries moves under trade agreements by which Turkey imports products (mainly industrial goods) from these countries.

TURKEY: Exports of unmanufactured tobacco by country of destination during 1955, with comparisons

Country of Destination	1953	1954	1955 1/
	1,000 pounds	1,000 pounds	1,000 pounds
United States.....	72,115	64,944	37,837
Western Germany.....	22,347	14,074	17,343
Eastern Germany.....	2,259	12,285	11,324
Poland.....	-	4,774	13,720
Hungary.....	2,242	2,425	3,204
Czechoslovakia.....	3,461	4,149	5,554
Soviet Union.....	-	1,139	2/
Yugoslavia.....	-	-	3,571
United Kingdom.....	10,251	10,766	7,535
Italy.....	6,821	1,552	6,713
France.....	4,447	4,969	4,661
Austria.....	3,615	2,107	2,972
Egypt.....	9,505	4,487	1,941
Belgium.....	5,655	3,543	2/
Switzerland.....	3,055	3,003	2/
Sweden.....	1,649	1,788	2/
Others.....	10,666	6,017	15,933
Total.....	158,088	142,022	132,308

1/ Preliminary.

2/ If any, included in others.

The demand for oriental tobacco is strong, but Turkish prices are already high and continue to increase. The wide disparity between the official rate of exchange established by the Turkish Government (2.80 liras per dollar) and the "unofficial" rate (7.00 to 10.00 liras per dollar) causes the price to be very high to hard-currency countries, which do not purchase under barter or compensation-type trade agreements.

American companies have purchased much smaller quantities of the 1955 crop (unmanipulated) than in recent years. On the other hand the Turkish Tobacco Monopoly has very large stocks due to much heavier than normal buying of this crop. The American tobacco industry will follow with keen interest the measures which the Turkish Tobacco Monopoly uses for disposing of these large supplies in world markets.

U. K. Consumption of Tobacco Products Continues Upward

Consumption of tobacco products in the United Kingdom, as indicated by sales to the public, during 1955 totaled 246.2 million pounds, 5.6 million pounds greater than 1954, and 9.1 percent above the 1947-51 annual average of 225.6 million pounds. Cigarette consumption continues upward and has increased 18.6 percent from the postwar low of 177.9 million pounds in 1949. Consumption of cigarettes during 1955 represented 85.7 percent of total consumption as compared with 76.3 percent during 1935-39. Consumption of smoking tobacco continues downward while consumption of cigars and snuff has been relatively constant since World War II.

UNITED KINGDOM: Consumption of tobacco products, as indicated by sales to the public during 1955, with comparisons

Year	Ciga- rettes	Cigars	Smoking tobacco	Snuff	Total
	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds
1935-39 Av.....	145.8	0.9	43.3	1.0	191.0
1947-51 Av.....	185.6	0.6	38.7	0.7	225.6
1953.....	198.5	0.7	35.8	0.7	235.7
1954.....	203.9	0.7	35.3	0.7	240.6
1955.....	241.0	0.7	33.8	0.7	246.2

Source: Board of Trade and Tobacco Bulletin (Supplement to Tobacco Intelligence), March 1956.

Canadian Tobacco Exports Up 16.3 Million Pounds

Exports of Canadian leaf tobacco during 1955 totaled 48.3 million pounds, exceeding 1954 by 16.3 million pounds. Shipments to the United Kingdom were 13.7 million pounds larger than for the previous year and accounted for 80.2 percent of total exports. Exports to other commonwealth destinations, particularly Australia, Jamaica, Trinidad and British Guiana, were 16.3 percent above last year; whereas, shipments to Western European countries were more than double the 1954 level of 1.6 million pounds.

CANADA: Exports of unmanufactured tobacco during 1955,
with comparisons

Country of Destination:	1953	1954	1955
	<u>1,000 pounds</u>	<u>1,000 pounds</u>	<u>1,000 pounds</u>
United Kingdom.....	23,284	25,141	38,810
British West Indies...	3,026	2,945	3,135
Other Empire	1,740	2,329	3,000
Foreign.....	439	1,615	3,435
Total.....	28,489	32,030	48,380
Source: Quarterly Stocks and Consumption of Unmanufactured Tobacco, December 1955.			

Most of the increase occurred in larger shipments of flue-cured, which totaled 45.5 million pounds as compared with 30.9 million pounds in 1954. Exports of stems and cuttings were the largest since 1950. Exports of Burley to the United Kingdom increased about 200,000 pounds over the preceding year.

Canadian stocks of unmanufactured tobacco on December 31, 1955 totaled 173.4 million pounds as compared with 168.6 million pounds in 1954. Stocks of flue-cured increased about 7 million pounds over the previous year. Burley, cigar and pipe tobaccos declined 2.4 million pounds.

Renewed Cuban-West German Trade Agreement Includes Tobacco

The Trade Agreement between Cuba and Western Germany has been extended to March 1, 1957, following the conclusion of negotiations held in Bonn on February 29, 1956, between representatives of the two countries. The new agreement increases the quantity of Cuban leaf tobacco as one of the items to be exported in exchange for German goods. Western Germany's imports of Cuban leaf tobacco during 1953 and 1954 totaled about .5 and 1.1 million pounds, respectively.

Denmark's Leaf Tobacco Imports Down 2.6 Million Pounds

Denmark's imports of leaf tobacco during 1955 totaled 21.3 million pounds -- down 11.8 percent from the 23.9 million pounds imported in 1954. Most of the decline occurred in smaller takings of leaf from the United States, Indonesia and Brazil. Imports from European countries, mainly from Turkey and Italy, were about the same as in 1954. Total takings from the other foreign countries, excluding those mentioned above, declined about 1.2 million pounds from the 1954 level of 4.4 million pounds.

DENMARK: Imports of leaf tobacco during 1955, with comparisons

Country of Origin	: 1953	: 1954	: 1955 1/
	: 1,000	: 1,000	: 1,000
	: pounds	: pounds	: pounds
United States.....	10,139	11,323	10,440
Brazil.....	4,719	4,707	4,613
Indonesia.....	3,043	2,967	2,431
European Countries 2/.....	812	558	559
Other Foreign Countries 2/.....	2,107	4,391	3,221
Total.....	20,820	23,946	21,264

1/ Preliminary.

2/ Breakdown by country not available.

Source: Vareomsaetningen Med Udlandet, December 1955

Barn Rot Reducing Southern Rhodesia's 1956 Flue-cured Crop

Southern Rhodesia's 1956 record harvest of 145.3 million pounds of flue-cured tobacco could be substantially reduced due to barn rot (leaf spot), according to a recent report. The Tobacco Research Board at Kutsaga also reports the prevalence of barn rot on a much larger scale this year than in the past which will necessitate considerable stripping of tobacco prior to sale. The quality of the 1956 crop will be substantially below that of previous years because of the high incidence of barn rot. This disease occurs at high elevations in Africa, particularly when the weather is cloudy and damp for an extended period just prior to harvest and during the curing season. Rot is caused by over-packing barns with tobacco, bad ventilation and excessive humidity.

Central African Federation Tobacco Exports Down 8.2 Million Pounds

Exports of unmanufactured tobacco from the Central African Federation (Rhodesias and Nyasaland) during 1955 totaled 124.3 million pounds, 8.2 million pounds below the 1954 record high of 132.5 million pounds. Flue-cured shipments totaled 106.6 million pounds, 1.9 million pounds less than the previous year, and accounted for 85.8 percent of total exports as compared with 81.9 percent in 1954. Exports of dark fire-cured and other types declined 4.8 and 1.5 million pounds, respectively, from the 1954 level.

CENTRAL AFRICAN FEDERATION: Exports of unmanufactured tobacco during 1955, with comparisons

Country of Destination	1953	1954	1955 1/
	1,000	1,000	1,000
	pounds	pounds	pounds
<u>Commonwealth Countries:</u>			
United Kingdom.....	71,208	77,488	67,995
Australia.....	8,220	11,243	11,145
Union of South Africa.....	1,883	1,459	11,238
Other Commonwealth.....	4,672	7,440	6,534
Total Commonwealth.....	85,933	97,630	96,912
<u>Non-Commonwealth Countries:</u>			
Netherlands.....	7,482	8,635	6,415
Western Germany.....	2,996	2,416	3,613
Belgian Congo.....	5,086	6,656	3,036
Belgium.....	1,221	1,549	2,176
Egypt.....	2,572	2,886	2,037
Denmark.....	1,603	4,458	1,638
Sweden.....	2,072	1,955	1,460
Norway.....	345	613	886
Austria.....	432	550	783
Other Foreign.....	4,068	5,114	5,339
Total Non-Commonwealth.....	27,877	34,832	27,383
GRAND TOTAL.....	113,860	132,462	124,295

1/ Preliminary.

Consignments to Commonwealth countries totaled 96.9 million pounds and were slightly below the 1954 exports of 97.6 million pounds. Exports to the United Kingdom totaled 68.0 million pounds, 9.5 million pounds less than in 1954, while consignments to the Union of South Africa increased from 1.5 to 11.2 million pounds. Shipments to other Commonwealth countries declined 1.0 million pounds from the previous year, largely as a result of reduced consignments to Nigeria, Kenya, Sierra Leone, Gambia, Hong Kong, Malaya and Singapore.

Netherlands Tobacco Imports Down 24.1 Million Pounds

Netherlands' gross imports of unmanufactured tobacco (direct imports plus withdrawals from bond) during 1955 totaled 63.9 million pounds, 24.1 million pounds below the record high of 88.0 million pounds in 1954. Most of the decline occurred in smaller takings from the United States, Brazil, Indonesia, Italy, Southern Rhodesia, Canada, and India.

Imports of United States leaf declined 10.3 million pounds from the 1954 level of 34.0 million pounds. Takings of all United States types declined with the greatest reductions shown in imports of seedleaf (cigar leaf) and flue-cured. Imports of flue-cured alone declined 9.6 million pounds from the 1954 takings of 27.0 million pounds. Also, combined imports of flue-cured from Southern Rhodesia, Canada and India were about 2.0 million pounds below the previous year.

NETHERLANDS: Gross imports of unmanufactured tobacco, direct and from bonded warehouses during 1955, with comparisons

Country of Origin	1953	1954	1955 1/
	1,000	1,000	1,000
	<u>pounds</u>	<u>pounds</u>	<u>pounds</u>
United States.....	25,486	34,037	23,479
Indonesia.....	8,710	13,301	8,126
Brazil.....	6,808	9,519	5,212
Greece.....	1,332	2,119	2,687
Turkey.....	4,361	7,652	9,317
Southern Rhodesia.....	5,851	5,824	4,034
India.....	3,939	2,921	2,811
Canada.....	57	343	148
Italy.....	3,082	3,307	2,101
Cuba.....	816	1,241	1,358
Other.....	11,869	7,730	4,630
Total.....	72,311	87,994	63,903

1/ Preliminary.

Source: Maandstatistiek vande in-, uit-en doorvoer per goederensoort, December 1955

Gross imports of oriental tobaccos (Turkish, Greek, Bulgarian and Yugoslav) were 2.1 million pounds greater than in 1954. Reexports of these tobaccos increased .9 million pounds, destined mainly to the United Kingdom, but usings of these tobaccos by Dutch manufacturers increased 1.2 million pounds over the previous year.

Reserve
1.943
F114

RLD TOBACCO ANALYSIS

INTERNATIONAL TRADE ISSUE

MIL. LBS.

600 —

500 —

400 —

300 —

100 —

1934-38
(Average)

'39

'49

1950

'51

'52

'53

'54

'55

'56

'57

**COMMUNIST CHINA
FLUE-CURED
PRODUCTION**

780

860

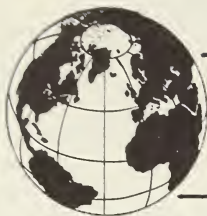
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UNITED STATES DEPARTMENT of AGRICULTURE

Foreign Agricultural Service

May 1956

Washington, D.C.



INTERNATIONAL TRADE ISSUE

WORLD TOBACCO ANALYSIS

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THE ROLE OF INTERNATIONAL TRADE

For more than 300 years, tobacco has been an important commodity in international trade. World exports of tobacco now amount to about 1.3 billion pounds a year--roughly equal to one-sixth of total world production. Generally, world trade in tobacco has been remarkably stable, despite some pronounced shifts in important markets as to sources of supply.

Tobacco is produced to some extent in practically every country of the world and enters the foreign trade of nearly every country, either in the form of leaf or manufactured products. There are numerous classes and types of tobacco, and these serve as the raw material used in the manufacture of tobacco products.

Most producing countries grow more than one type of leaf, but must supplement domestic production by imports of other types in order to satisfy consumer desires. Some produce a substantial surplus and export large quantities, but also must import certain grades or types of foreign tobacco to meet consumer requirements. Some are virtually self-sufficient in tobacco.

International trade in tobacco reflects consumer preferences for various kinds of tobacco products. Artificial measures of control, however, usually governmental, always have played an important role in shaping consumer preferences for tobacco products and for the types of tobacco used in their manufacture. Politico-economic considerations have been effective in directing import trade in leaf tobacco into desired channels. These control measures also have had the effect of limiting the amount of leaf which otherwise would have moved in world trade.

World trade in tobacco products is considerably less important than that in leaf due largely to extreme protectionist policies of governments in favoring their own domestic manufacturers and labor. For example, the United Kingdom during the 1920's enjoyed a substantial export trade in cigarettes with China. This was supplanted by domestic Chinese manufacture utilizing United States leaf tobacco, and later by the manufacture of cigarettes made largely from leaf produced within China itself.

International trade in tobacco has been important to the leaf tobacco industry since shortly after the discovery of the plant and

the unique use made of it by the natives in the New World during the early years of exploration. Smoking soon became quite fashionable in Western Europe--particularly in England--and the resulting demand for leaf brought fantastically high prices in the colonial areas of the Western Hemisphere. Tobacco-growing on a commercial scale coincided with the founding of the English colony at Jamestown, Virginia in the early 1600's.

Tobacco seed soon was carried over most of the world and attempts were made to grow the plant in all consuming countries. There was limited success, however, as the tobacco plant, so strongly influenced by soil and climatic conditions, produced an entirely different flavor and aroma when it was transplanted from its natural habitat. America then became, and has remained the most important producer. Western Europe with its large population, and purchasing power became, and continues to be the most significant importing area. The climate in Western Europe has not favored production of the most-desired types of leaf. Large imports of all types of tobacco have been necessary.

As tastes in consumption changed, so did demand for various types of tobacco. The popularity of snuffing shifted to pipe smoking and then to cigarettes. The change in need for leaf shifted accordingly from dark tobaccos to the use of flue-cured, light air-cured, and oriental types. The rise and fall of the chewing habit has had no effect on world trade, since it is a custom largely confined to America. This changing pattern of consumer preferences, and the resulting popularity of various types of tobacco greatly affected the geography of tobacco production on both a country-wide and world-wide scale. International trade was affected accordingly.

Governmental restrictions on international trade have continued to increase over the years, and now constitute the most important factor influencing such trade. The operation of government tobacco monopolies, tariff levels, import quotas, restrictions upon the use of foreign exchange, state trading, bilateral and compensation agreements, preferential duties, guaranteed markets, export subsidies, manipulation of currency exchange rates and mixing agree-

ments--all tend to limit the amount of leaf imported, and to channel imports toward selected sources.

The United States has been the most important tobacco exporter throughout its history. Indonesia (formerly the Netherlands East Indies) for many years ranked second in exports due to the fine cigar leaf grown there, but exports have greatly decreased since the beginning of the Second World War. The Central African Federation and Canada are of fast growing importance as flue-cured exporters. India remains important as an exporter of low quality flue-cured tobacco. Turkey and Greece are the major exporters of aromatic (oriental) tobacco, and production and exports of these countries are increasing. Brazil, Cuba, the Dominican Republic, and the Philippine

Republic are important exporters of dark and cigar leaf tobaccos.

The United Kingdom in the 1930's supplanted Germany as the most important leaf tobacco importer, and now takes about one-fourth of all leaf tobacco moving in world trade--mostly flue-cured for cigarette manufacture. Despite considerable domestic leaf production, Germany remains the second largest importer. It is a major market for oriental tobaccos, United States flue-cured cigarette leaf, and Indonesian and Brazilian cigar leaf. The United States is the third largest importer of tobacco, largely oriental leaf from Greece and Turkey used in small percentages as a flavor ingredient in cigarettes. Cigar leaf imports into the United States--mainly Cuban filler--are also fairly substantial.

WORLD PRODUCTION TRENDS--SUMMARY

World production of tobacco reached a record high of 8.1 billion pounds in 1955, thus continuing the upward trend that has been evident for a long period of years. The estimated 1955 outturn of leaf tobacco was slightly above the previous year's level, but was 13 percent larger than the 1947-51 average and about one-fourth above the prewar (1935-39) average. World tobacco production during the postwar period has been stimulated by the desire of exporting countries to obtain foreign currencies and by an increase in cigarette consumption, especially cigarettes containing high percentages of light tobaccos. This development has had a great impact on the pattern of postwar production and exports.

In the immediate prewar period production of flue-cured, Burley and oriental--the principal light types of tobacco entering world trade--accounted for about one-third of the total world crop. During 1955, however, these same tobaccos, combined, amounted to more than 50 percent of total world production. Generally favorable prices for United States cigarette leaf during the postwar period have been influential in making the growing of tobacco, particularly light tobaccos, more attractive to such countries as Southern Rhodesia, Canada and India. Increases in production of light tobaccos (including oriental) have also been stimulated by factors other than increased demand for milder cigarettes.

These factors include preferential tariffs, bilateral trading arrangements, guaranteed purchase agreements, state trading and strict controls on imports from the "dollar" area.

The changes in production patterns are reflected in the pattern of international trade in tobacco. Major exporters of light cigarette tobaccos have expanded their markets, while cigar and other dark leaf have become less important than in prewar world tobacco export trade. This trend is reflected in exports from individual countries. Important grower-exporters of light leaf have expanded their exports. Such countries include the United States, Central African Federation, India, Canada, Greece and Turkey. On the other hand, total world exports of cigar and dark tobaccos have become less important than in prewar years. A number of countries, including Indonesia, Brazil and the Philippine Republic now have a smaller share in world exports than formerly.

The following section describes in some detail production trends and export prospects of some of the major competitors of the United States in world tobacco trade.

COMMUNIST CHINA

Summary

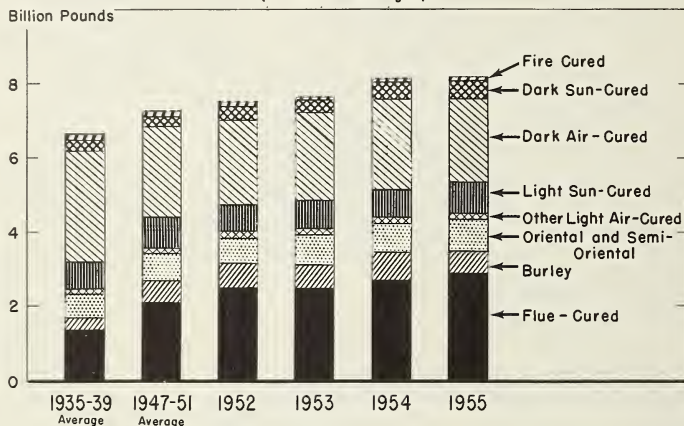
Despite many apparent discrepancies in official figures released by Communist

PRODUCTION FOR EXPORT

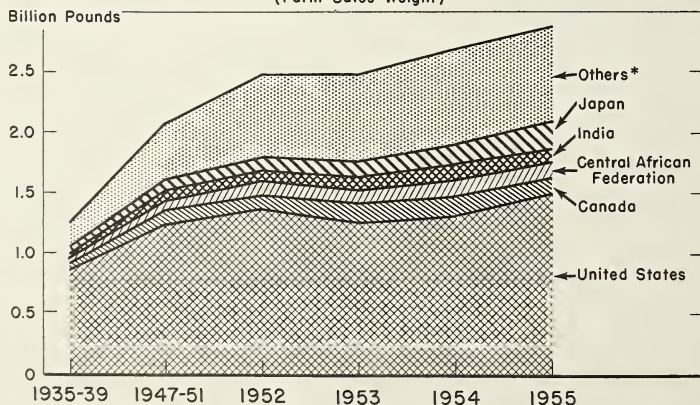


Rhodesian tobacco farms

**ESTIMATED WORLD PRODUCTION OF TOBACCO, BY TYPES:
AVERAGES, 1935-39 & 1947-51; ANNUAL 1952 THROUGH 1955**
(Farm-Sales-Weight)



**ESTIMATED WORLD PRODUCTION OF FLUE-CURED TOBACCO:
AVERAGES, 1935-39 & 1947-51; ANNUAL, 1952 THROUGH 1955**
(Farm-Sales-Weight)



* Includes Communist China.

Chinese sources, it must be recognized that Communist China has made great strides towards its goal of becoming an important flue-cured tobacco exporter. Analysis of supporting data, coupled with the practice of harvesting stubble crops after the normal crop, leads to the conclusion that Communist China's claims of production achieved in recent years could well be correct. Even conceding that a very large percentage of this tobacco is of inferior quality, complete control of marketing by the state could result in the dumping of substantial amounts of marketable leaf on free world markets. The threat of this new and large source of flue-cured leaf tobacco, available for export into free world markets, is, therefore, very real. The austerity program practiced for domestic tobacco consumption, the importation of extremely low grade leaf from India in order to maintain Communist China's exports, and the sacrifice of badly needed food crops point up the determination to keep it real.

Tobacco Developments in Communist China

A few years ago many people believed that Communist China would again become an important export outlet. Just the reverse has happened. In a few short years, Communist China has become an important supplier in world export trade. If present plans are realized, it might well become the second largest tobacco exporting country.

For many years prior to Communist domination, China ranked as one of the world's largest tobacco importers and was second to the United Kingdom as an outlet for United States tobacco. In recent years, imports into Communist China from the free world have been sharply reduced.

Free world producing countries, already burdened by surpluses, may suddenly be faced with formidable competition from this new supplier. The threat is all the more serious in that it is state policy to divert leaf into export channels, regardless of supplies available for domestic consumption. At present, most of the leaf exported from Communist China moves to other Soviet bloc countries. It is presently impossible accurately to forecast the quantity that may eventually become available for export, or the markets to which it may be

sent. But if goals are realized, China will be in a position to move considerable leaf to the major world markets of Western Europe.

Production

The drive towards a much larger tobacco production (primarily flue-cured) is taking place in a country which is so heavily over-populated that as many crops per year as possible are grown on each piece of land. Tobacco-growing has received priority at the expense of food crops in an area chronically short of food. However, if Communist China is to accomplish its objective of greater industrialization, it must find means of paying for the industrial goods to make this development possible.

Tobacco admirably fills this bill in several important respects: (1) light cigarette tobaccos are needed in other areas of the Soviet bloc--particularly Eastern Europe--from which steel and other basic industrial products may be purchased; (2) the returns and foreign exchange earnings per acre devoted to tobacco are high and the value per pound of tobacco is also high, making the transportation problem less difficult than for more bulky products; (3) tobacco production utilizes much of Communist China's most plentiful commodity--labor--and at the same time utilizes comparatively little of its overworked land.

Communist China's intention to sharply increase tobacco production is shown by goals for flue-cured leaf included in the five-year plan initiated in 1952. The goals were not announced by the Communist regime until mid-1955, at which time it was obviously convenient to understate figures for the years 1949 and 1950, in order to make production gains under the Communist regime look favorable by comparison. The goals as announced retroactively in 1955 used the year 1952 as a base, and succeeding years were expressed in terms of increases, either in plantings or harvest, from the figures for that year.

Known production figures for flue-cured in China (including Manchuria) averaged 186 million pounds during 1934-38 and amounted to 300 million pounds in 1939. Known acreage figures averaged 184,000 for the 1934-38 period, and 300,000 in 1939. The following table compares planned production goal figures with official Communist production data.

Area and Production of Flue-cured Tobacco in Mainland (Communist) China
(including Manchuria)

Year	Planned Production Goals	Official Production	Official Acreage
	Wilson pounds	Wilson pounds	1,000 acres
Av. 1934-38.....	-	186	184
1939.....	-	300	300
1949.....	-	95	150
1950.....	-	80	-
1951.....	-	375	-
1952.....	-	485	460
1953.....	715	475	473
1954.....	625	500	540
1955.....	690	520	-
1956.....	780	-	-
1957.....	860	-	¹ 690

¹Planned

The announced goals proved unrealistic. Actual production, as stated by Communist officials, was substantially below goals during the first three years of the plan. Steps undertaken to reach goals include: (1) larger acreages at the expense of badly needed food crops; (2) top priority for scarce fertilizer in order to increase yields; (3) stepped-up technical assistance to growers; (4) increased production by harvesting stubble crops of flue-cured tobacco and by utilizing suckers and ground leaves; (5) sharp increases in prices paid for flue-cured leaf; and (6) unusually fast conversion of the semi-socialist producer cooperatives into full Communist collectives, thereby enhancing the power of the Communist Director in exercising rigid controls.

Despite sharp increases in production made in some areas in Communist China by these methods, a number of factors have restricted overall gains. These factors include: Floods in some areas, drought in others, insect infestation and widespread disease damage, poor-yielding soil due to heavy cropping, fertilizer shortages, insufficient technical knowledge of many producers and the apprehension of the peasants that planting their own land to tobacco would not provide them sufficient food crops for their own needs. In 1955, drought in some areas at a time when the late crop is normally transplanted, floods in Shantung and Anhwei, and severe Black Shank damage in Honan and Shantung provinces, were partly responsible for the shortfall in production. Shortages of chemicals for controlling disease and insects, particularly aphids, and also the lack of technical knowledge all contributed to low yields.

Over two-thirds of the Chinese production of flue-cured tobacco is in Honan and Shantung provinces, but it is relatively important in Anhwei, Liaoning (formerly part of Manchuria), Kweichow and Yunnan. There is some production reported in Kwantung and other provinces, but little is known as to exact output. Increases of production in 1955 apparently were greatest in Yunnan, Liaoning and Anhwei.

The Communist China Bureau of Industrial Crop Production has indicated that greater assistance must be given to farmers in establishing new flue-cured producing areas, increasing the supply of fertilizers, and aiding growers in building and repairing curing barns and in procurement of seed. This Bureau has indicated further that more attention must be given to growers' reaction to prices.

In order to obtain a larger supply of flue-cured tobacco, the Communist China Joint Ministry of Agriculture and Commerce issued a directive in mid-1955 that, in addition to the normal crop, growers should harvest stubble growth and strip bast from tobacco stalks. It was reported that stubble growth was harvested after the early crop from about 10 percent of the acreage in Honan and Anhwei provinces in 1955, resulting in an additional yield of about 270 pounds per acre. Plans were made to extend this practice to Shantung, Kweichow, Yunnan and Liaoning provinces.

Flue-cured is purchased by the state in advance of harvest by marketing cooperatives through the use of contracts with growers. Purchases of flue-cured tobacco by private buyers is now practically nonexistent. Official state prices were increased sharply in 1954 and again in 1955 as low prices had been causing considerable difficulty in obtaining the desired production increase and securing delivery of leaf to the state collection agencies. In Kwantung province, official collective prices of the 1954 crop were about one-third above those for 1952. The state control of purchases of flue-cured is much more complete than for other kinds of tobacco. In early 1955 private operators were still purchasing a substantial proportion of non-flue-cured tobaccos and there are indications that private individuals were paying 50 percent more than the official collecting agencies for some types of non-flue-cured leaf.

Exports

Each year since 1950 Communist China has had trade agreements with various areas, particularly the Soviet bloc, providing for Chinese exports of flue-cured tobacco, largely in exchange for industrial products. The first flue-cured exports under these arrangements were reported as having been made in April 1952. It is estimated that about 50 million pounds were available for export in 1952, and fairly reliable information indicates that exports of Chinese flue-cured in 1953 totaled about 90 million pounds and rose to 100 million pounds in 1954. Exports in 1955 are believed to have at least equaled the level of the previous year. Practically all of these exports have been destined to Soviet bloc countries, including East Germany, Poland and Czechoslovakia. Small quantities of tobacco, including non-flue-cured varieties, are being exported to Egypt, Hong Kong and Macao. It is reported that only the better grades of leaf--particularly of flue-cured--are being exported. An attempt to increase exports may be expected in the near future, considering the emphasis that is being placed on tobacco export trade as a means of paying for much needed industrial imports.

Domestic Manufacture

Growing demand for tobacco products, particularly cigarettes, within China itself, and substantial exports of leaf to other bloc countries, have made the problem of failure to meet production goals for flue-cured tobacco more acute. Although output of cigarettes apparently has been rising rather rapidly, demand has not been satisfied. Various steps have been taken by the Communist authorities to stretch the output of products from the limited supplies of leaf available to manufacturers. Exports have been maintained or increased at the expense of leaf supplies available for domestic consumption. To partially make up for this restricted domestic supply of leaf, imports of low-grade flue-cured tobacco from India were made in both 1954 and 1955 and a bilateral trade agreement with Yugoslavia was signed in 1956 providing for exchange of Chinese goods for Yugoslavian leaf tobacco. The reduction in the amount of tobacco used per case of cigarettes, as well as the lower quality of the leaf has resulted in the output of an inferior, loosely-packed product. Consumer complaints have been widespread.

UNITED STATES¹

Tobacco has been produced for export in the United States since early colonial times. Originally the bulk of the crop was exported, but by the close of the 19th century domestic manufacture of tobacco in the United States assumed importance and exports then averaged about 38 percent of production. In recent years, about every fourth acre of tobacco has been produced for export.

Presently, tobacco is the main source of cash income for more than 850,000 farm families in the United States and Puerto Rico. The gross cash return to farmers from the 1955 crop is estimated to be approximately \$1,176,000,000, and the second highest crop value of record. Tobacco requires much labor and close attention by the producer and is grown largely by individual families with small acreages. In recent years, the average acreage per family has been less than 2 acres.

Production

Production of all United States tobacco for the 1955 crop year is now placed at about 2,227 million pounds, a decrease of 2 percent from the previous crop, but above the prewar level. Almost 90 percent of this production was in those kinds of tobacco used principally in cigarette manufacture. Flue-cured production now estimated at about 1,480 million pounds (based on sales data) was the largest in history and represented almost two-thirds of total United States production. Ideal weather, combined with improvements in production including new varieties, raised average yields per acre to a record level. Burley production estimated at 470 million pounds was considerably below the previous year and reflected the 25-percent reduction in allotted acreage. Maryland production was below the previous year due primarily to hurricanes which caused considerable loss in the fields. Production of dark tobaccos and cigar classes was down some from a year ago.

Marketing quotas are in effect on the major kinds of tobacco again in 1956 and price supports will be at 90 percent of parity, as provided by law. The allotted acreage will be about the same as in the past year for most kinds of tobacco, except flue-cured which has been reduced 12 percent and the cigar filler and binder classes which have been reduced 12½.

¹Contributed by Tobacco Division, CSS

Effects of Domestic Programs

Foreign trade in United States tobaccos is expected to remain high in 1956. Exports probably will decline somewhat from the past year due to increasing competition of foreign-grown tobaccos and the changing pattern in domestic markets of the United States.

The impact of marketing quotas and price supports upon the export market for United States tobacco has been considerable. Some favorable results have been that prices of United States tobacco have been maintained at a stable level under the price-support program and supplies have also been maintained at adequate levels for both domestic use and export. Under provisions of the law regulating the marketing quota program, supplies are maintained at a normal year's domestic consumption and exports plus 175 percent of a normal year's domestic consumption and 65 percent of a normal year's exports as an allowance for a normal carryover and a 5-percent reserve thereof. Such a carryover is maintained to insure a supply adequate to meet domestic consumption and export needs in years of drought, flood, or other adverse conditions, as well as in years of plenty.

Demand Shifts

Currently, the disturbing factor in the United States' production picture is the changing pattern of demand in domestic markets and its impact on exports. A preliminary analysis of the tobacco requirements for the manufacture of cigarettes indicates that demand for regular cigarettes has dropped and filters have picked up part of the slack. Demand for grades of flue-cured, Burley and Maryland tobacco normally manufactured in regular and king-size cigarettes has declined from 1,230 to an estimated 950 million pounds of farm weight tobacco in 3 years. In contrast, filter cigarette production has increased the demand for different qualities and grades of these same kinds of tobaccos from about 30 million pounds to approximately 250 million pounds of farm weight tobacco in the same period. This situation has tended to increase demand in the domestic markets for some grades of cigarette type tobaccos that are normally exported. Thus, the available supplies of cigarette tobaccos in the United States tend to be long and heavily weighted in quality premium grades. This situation increases the available supply of

British-type cigarette grades of tobacco for the United Kingdom and Australia, and for such countries as Japan, Thailand and Italy, which use top quality American tobaccos as a blender. Supplies for both domestic and foreign demand of desired qualities are expected to be adequate.

CENTRAL AFRICAN FEDERATION (SOUTHERN RHODESIA, NORTHERN RHODESIA AND NYASALAND)

Production

Production harvested in 1956 is an all-time record and the prospects are that United States tobacco exports will continue to face increasing competition from rising production and improving quality of Federation leaf. Total Federation production of flue-cured, the most important export type, this year was 158 million pounds. Great efforts are being made to improve both yields and quality, particularly of flue-cured, and considerable success has been achieved. Not only was the acreage of flue-cured harvested this year 13 percent above that of 1955, but the average yield was raised sharply. The average yield of Southern Rhodesian flue-cured rose to 760 pounds per acre--an all-time high--which was 8 percent above that of 1955 and about 20 percent above the 1947-51 average. If this rate of increase is continued, the output of flue-cured in the Federation would rise to 185-190 million pounds by 1960 even with no increase in acreage. The use of improved and adapted varieties, the use of more fertilizer, and increased acreage under irrigation will continue to improve both yield and quality.

Research and Improved Practices

This area has a comprehensive program of research and experimental work, particularly on breeding and testing varieties, determining soil deficiencies, fertilizer needs, crop rotations, and disease and insect control. It is making rapid strides in these fields and producers are using modern production methods and practices. However, production costs, particularly wages, are rising, but are expected to be offset by improving yields and quality. Thus the cost of production per-pound may not increase.

Irrigation of flue-cured tobacco is expanding rapidly in Southern Rhodesia,



Southern Rhodesia flue-cured tobacco beds



Southern Rhodesia field of flue-cured tobacco

although the water available limits the expansion in irrigated area. With only part of the crop irrigated, the barns and labor force can be utilized much more efficiently. The irrigated crop may be transplanted in the period July-October, with harvest just before or just after the non-irrigated crop is transplanted, which is usually between November 15 and December 15. Yields of more than 1,500 pounds per acre on irrigated crops have been reported with the average quality well above that of the non-irrigated crops.

Expansion of Rhodesian production has been chiefly due to the preferential import duties and guaranteed purchase agreements with the United Kingdom and Australia, plus the limited availability of "dollars" for United Kingdom purchases of tobacco. The levels and stability of United States tobacco prices also have contributed to expanded production in the Federation.

Export Price Comparisons

Rhodesian leaf is now accepted in many world markets and consumers have recently been willing to pay increasing prices for such tobacco. However, some difficulties are being experienced. Prices of the better quality grades of Rhodesian flue-cured have been well above the cost of similar qualities of United States leaf, but the prices of most of the medium and lower qualities of Rhodesian flue-cured are far below those of United States flue-cured. Outside the United Kingdom and Australia, most of the competition which Rhodesian flue-cured furnishes to United States exports is primarily from medium and low quality leaf. The high prices received for the good quality leaf is chiefly due to the preferential import duties in the United Kingdom and Australia. It will be very difficult to expand exports of the better grades of Rhodesian flue-cured outside the areas where preferential import duties are enjoyed, unless the prices of such grades are competitive with those for similar qualities of United States leaf. During the first 4 weeks of the 1956 season, sales of flue-cured leaf at the Salisbury auctions averaged the equivalent of 38 cents per pound, compared with 50 cents for the same period in 1955. Most of the decline occurred in the medium and high grades. Average quality of offerings was below that of last year.

TURKEY

Turkey is the world's second largest exporter of cigarette tobacco. Production and exports have been increasing in recent years. Shipments of Turkish leaf, however, dropped in 1955 to 132 million pounds, 10 million less than in 1954. Exports to the United States dropped from 64.9 million pounds in 1954 to 37.8 million in 1955, and exports to France, East Germany, the United Kingdom and Egypt also declined. These losses were offset partially by larger exports to West Germany and Soviet bloc areas (Poland, Czechoslovakia, Hungary), and Yugoslavia, which took no Turkish tobacco in 1954, but imported 3.6 million pounds in 1955. Primarily because of the continuing inflation, prices of Turkish tobacco have risen sharply in recent years and this may tend to slow the trend toward larger exports. Price increases have been especially great for European grades, partly due to inflation, but also because demand for these grades has risen more than for other qualities.

Production Sets Record

Production of tobacco in 1955 is estimated at a new record, 255 million pounds from 385,000 acres--slightly higher than the previous record crop of 249 million pounds in 1953, and well above the 1947-51 average of 194 million pounds. Last year's crop exceeded that of 1954 by 17 percent, but like the Greek crop, last year's quality was below average.

Oriental tobacco production in Turkey has increased primarily in response to a stepped-up world demand for cigarette leaf, particularly in Europe and the United States, where most oriental leaf is used. This demand, coupled with high prices for Greek tobacco during the early postwar years, contributed to the ready export market for Turkish tobacco. Later, stabilization of the Greek currency increased the competition that Turkish as well as other oriental tobaccos faced in foreign markets. Entrance of the Soviet bloc as large buyers and increased shipments to Western Europe and the United States, together with support operations by the Turkish Tobacco Monopoly, have contributed to larger tobacco production in Turkey.

Government Measures

Early in 1956, the Turkish Government paid tobacco producers a premium equivalent



Sun curing Turkish leaf near Samsoun, Turkey. The leaf is cured in the sun, usually being hung against a shelter to prevent wind damage and is taken inside to prevent damage in case of rain which very seldom occurs during the harvest period.



Partially cured Turkish leaf almost ready to be packed in bales. Turkish leaf is manipulated (sorted and baled) and is left in storage 6 to 9 months where it undergoes fermentation (it is not redried) prior to being exported or used domestically.

lent to 4 United States cents per pound (at the official rate of exchange) for every pound of tobacco sold. The Tobacco Monopoly conducts buying for domestic manufacture as well as to support prices to farmers. The Monopoly disposed of surplus stocks in special export sales arrangements.

To support the 1955 crop sold early in 1956, the Monopoly extended its buying operations far above the usual amounts taken. This was partly due to the fact that buyers representing United States' tobacco companies were largely out of the market when the unmanipulated 1955 crop was sold early in 1956. Because of increasing prices of Turkish tobacco and the possibility of devaluation, American buyers do not wish to invest in unmanipulated Turkish tobacco. During unstable periods, there is considerable risk in purchasing unmanipulated oriental tobacco as it remains in the producing country for a long period (usually 6 months to more than a year), while the leaf is being manipulated and prepared for export.

Vigorous buying by the Monopoly turned a potentially weak market for a poor quality 1955 crop into one in which prices paid to farmers are reported to be slightly above that of last year, when quality of the 1954 crop (sold in 1955) was well above average. In the past TEKEL (the Tobacco Monopoly) has lagged behind the tobacco merchants and foreign buyers by letting them set prices, but this year TEKEL was forced to assume a more important role in determining prices.

Other world tobacco exporters will watch closely foreign sales operations of the Turkish Tobacco Monopoly in disposing of surplus leaf. Other exporters have an especially keen interest in possible developments, particularly since there is a belief that in the absence of devaluation of the Turkish currency, extensive subsidization and greater use of bilateral agreements may be necessary in order to move stocks into world markets. It is probable that part of the additional stocks will be disposed of through larger sales under bilateral agreements with Soviet bloc countries.

At this time, it is impossible to make a reliable estimate of 1956 exports of Turkish tobacco because many factors of extreme importance have not been decided or at least not announced. The intention of Turkish farmers is to plant about the same acreage as in 1955. Seedlings, however, have been

delayed by cold weather. Production in 1956 is expected to be somewhat below 1955.

GREECE

Greece is the fourth largest free world exporter of cigarette tobacco, being exceeded only by the United States, the Central African Federation, (Southern Rhodesia, Northern Rhodesia and Nyasaland) and Turkey.

Production Sets Record

A new record of tobacco acreage and production was reached during 1955. Production of 207 million pounds exceeded the previous record crop produced in 1936, and was 58 million pounds greater than the 1954 crop. This does not include the additional 12 million pounds which was damaged so badly by late rains that it was not harvested. The rise resulted from an increase in acreage from 266,000 acres in 1954, to 318,000 acres in 1955, together with a near record yield of 650 pounds per acre of usable tobacco. Average quality, however, was lower than for the 1954 crop. This increase in production represents a continuation of the sharp upward trend in effect since World War II. United States cigarette tobaccos are expected to face increasing competition from Greek tobaccos, especially in a number of countries of Western Europe.

By March 1 of this year, merchants had purchased approximately 147 million pounds of the 1955 crop (unmanipulated) for an average of 38.1 cents (United States equivalent) per pound compared with 38.0 cents for the 1954 crop, and 31.6 cents for the 1953 crop. The average price paid to farmers for the entire 1955 crop may decline, as normally much of the lower quality leaf is sold late in the season. However, prices paid by merchants so far indicate that they expect average export prices for the 1955 crop to be as high or slightly higher than for the 1954 crop, even though average quality is lower.

Government Measures

New policies which affect Greek tobacco producers and consumers were put into effect in September 1955. This legislation provides for lowering the tax rate on cigarettes, elimination of the land tax on all tobacco production, (previously there was a land tax of 14 percent on all tobacco

used in Greece), and the establishment of a "Reserve Fund for the Protection of Tobacco Production" to be utilized for effecting policies in regard to tobacco production--presumably chiefly for price support purposes.

The Greek Government is stepping in to support the prices paid to farmers by purchasing considerable quantities of leaf if the price weakens badly. The Bank of Greece is prepared to supply a high percentage of the credit to tobacco merchants purchasing tobacco for manipulation. The Ministry of Commerce has indicated that the Government would pay merchants 90 percent of the FOB price for leaf in order to withdraw about 25 million pounds from regular marketing channels.

The relatively favorable price, together with the record crop, undoubtedly has resulted in good incomes to tobacco farmers. Under such conditions, the acreage planted in 1956 will probably remain near that of 1955. However, total production in 1956 may be smaller than in 1955 as another near record yield is hardly to be expected. Tobacco producers are being advised not to increase the acreage, but concentrate on improving quality.

Principal Markets

Over half of the volume of exports and sixty percent of the total value of tobacco exports in 1955 was due to purchases by the United States and West Germany. West Germany was the largest buyer, taking 41.7 million pounds last year compared with 37.9 million in 1954, but United States purchases showed the largest increase rising from 14.4 million pounds in 1954 to 22.7 million in 1955. There has been a continuing upward trend for a number of years in the United States purchases of Greek tobacco. This was given considerable impetus by continuing inflation in Turkey with resulting increases in prices of tobacco exported from that country. In 1955, there were increases in Greek tobacco exports to some countries of Western Europe although shipments to Italy, Austria and Finland declined. Shipments to the Soviet bloc decreased sharply, especially to the Soviet Union, whose purchases fell from 8.2 million pounds in 1954, to only 1.4 million in 1955. However, with larger supplies available for export, shipments behind the Iron Curtain are likely to rise again. It is important to note that for the first

time since 1948 Greece has a trade agreement with Czechoslovakia providing for the export of 2.6 million pounds of Greek leaf in 1956.

Prices and Quality

Exports during 1955 from the crops of 1954 and earlier years were 121 million pounds, the largest exports in 30 years. Favorable export prices prevailed during 1955, averaging the equivalent of 63.5 United States cents per pound, compared with an average of 53.5 United States cents in 1954. Part of this was due to the fact that quality of the 1954 crop, exported in 1955, was well above average. On the other hand, quality of the 1955 crop was well below average, as shown in the table below.

Estimated amounts of the 1954 and 1955 crops in specified grades:

<u>Grades</u>	<u>1954 Percent</u>	<u>1955 Percent</u>
No. I and II American		
Grades	62	44
No. III European	24	37
No. IV Kappas ¹	14	19

¹Used mostly for domestic production of cigarettes

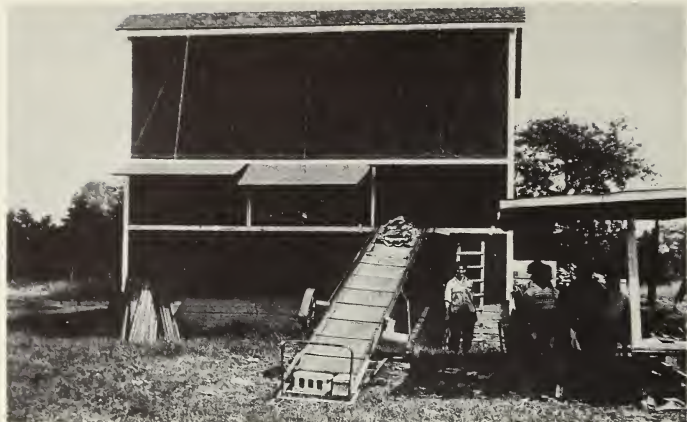
With the large amounts of the 1955 crop in the Kappas and European grades, there may be considerable pressure to reduce the prices to be paid by exporters for the lower quality grades of manipulated leaf in 1956. Prices of the better grades are expected to remain firm.

Greek officials expect that exports during 1956 will be about 132 million pounds, 11 million pounds more than was exported in 1955. This optimistic outlook is based on the increasing demand by the United States, Western Europe and the Soviet bloc countries.

CANADA

Production Larger in 1956

Tobacco production is expected to resume its upward trend in 1956 after a planned reduction in 1955. A few years ago, Canada was a large importer of United States cigarette leaf, but the neighbor to the north is now an exporter of such tobaccos. Canada recently has been the third or fourth most important producer and fourth largest free



Housing flue-cured on the large tobacco farms (average of 32 acres of tobacco per farm) near Simcoe, Ontario, Canada. Note the elevator and side doors both of which save labor.



Machine harvesting flue-cured near Simcoe, Ontario, Canada. Note the tree windbreak in the background which are extensively used to reduce wind damage. Sticks are handed directly from the machine platform through the side doors of the barn (accompanying picture).

world exporter of flue-cured leaf. United States tobacco exports are likely to continue to face increasing competition from Canadian supplies in important world markets.

The Ontario Flue-cured Tobacco Marketing Association has set the 1956 acreage of members at 91 percent of their base acreage. On the basis of average yields, production from this area, plus the probable output of the other producers in Ontario and Quebec, is expected to total 165 to 170 million pounds in 1956.

Production rose sharply in recent years from an average of 112 million pounds in the 1947-51 period to 173 million in 1954. In 1955, the planned acreage was reduced to about 78 percent of that of the previous year and actual production was reduced even further to about 122 million pounds or only 70 percent of 1954, as a large amount of the crop was destroyed by early frosts.

Canadian flue-cured is of good quality, but some of the crop is frequently harvested before it is fully ripe--in order to avoid damage by frost. Producers are very efficient, and employ the most modern methods and practices. Per acre yields are high--above the United States average in recent years. Canada has an important advantage over the United States in that its unmanufactured tobacco enjoys a lower (21.5 United States cents per pound less) import duty in the United Kingdom and certain other British Commonwealth areas.

Burley is the other export type produced in Canada. While exports have not been large, a light cigarette type was produced in 1955 and the acreage in 1956 is to be increased 20 percent. Most of the planned increase is for export. Production in 1956 is expected to be about 7.5 million pounds compared with 6.5 million in 1955.

Exports of Unmanufactured Leaf

The 48 million pounds of unmanufactured leaf exported in 1955 was an all-time record. About 38 million pounds of flue-cured was shipped to the United Kingdom, with Australia and the British West Indies being the other principal markets. In 1956, exports of flue-cured are expected to be below the level of 1955, partly because the crop was reduced in 1955.

Almost a million pounds of Burley was exported in 1955 and practically all of this

was shipped to the United Kingdom. Canada hopes to expand exports of cigarette Burley to other countries, particularly in Western Europe. Domestic consumption of cigarette leaf has been rising rapidly and this is expected to continue.

INDIA

Production Up

India is the free world's second largest producer of tobacco, and ranks fifth in total exports of tobacco. It is the third largest exporter of flue-cured in the free world, ranking after the United States and the Central African Federation.

Production of tobacco harvested this year is estimated at 570 million pounds compared with 556 million in 1955, and an average of 547 million in the 1947-51 period. Output of flue-cured, the most important export type, rose to about 125 million in 1956 compared with 119 million in 1955, and an average of slightly less than 65 million during 1947-51. Indian flue-cured is a neutral cigarette filler, with very little aroma and flavor. Average quality is low. The work underway for improving quality and yields will probably make some progress, but no sharp improvements are expected as the soil and climatic conditions are not conducive to high yields or the production of high quality cigarette tobaccos.

Exports of Unmanufactured Tobacco Increasing

Flue-cured accounts for the bulk of exports, but limited quantities of Natu (dark sun-cured), Burley and other types are also sold in foreign markets. Exports increased sharply from 74 million pounds in 1954 to 87 million in 1955. As usual, the United Kingdom was the largest purchaser. However, in 1955, exports to the United Kingdom as well as to Aden, Hong Kong, Nigeria, Kenya, Australia and Burma declined, but these decreases were more than offset by large increases in shipments to Communist China and Indonesia.

Although strong efforts are being made to expand exports, greater competition is being experienced, especially within the British Commonwealth by increased production of neutral-type flue-cured in the Central African Federation, and this tobacco is considered of better quality than Indian leaf.

The level of exports in the next few years will depend to a considerable extent on the amount taken by Soviet bloc countries. This is difficult to predict as the state policy in Com-

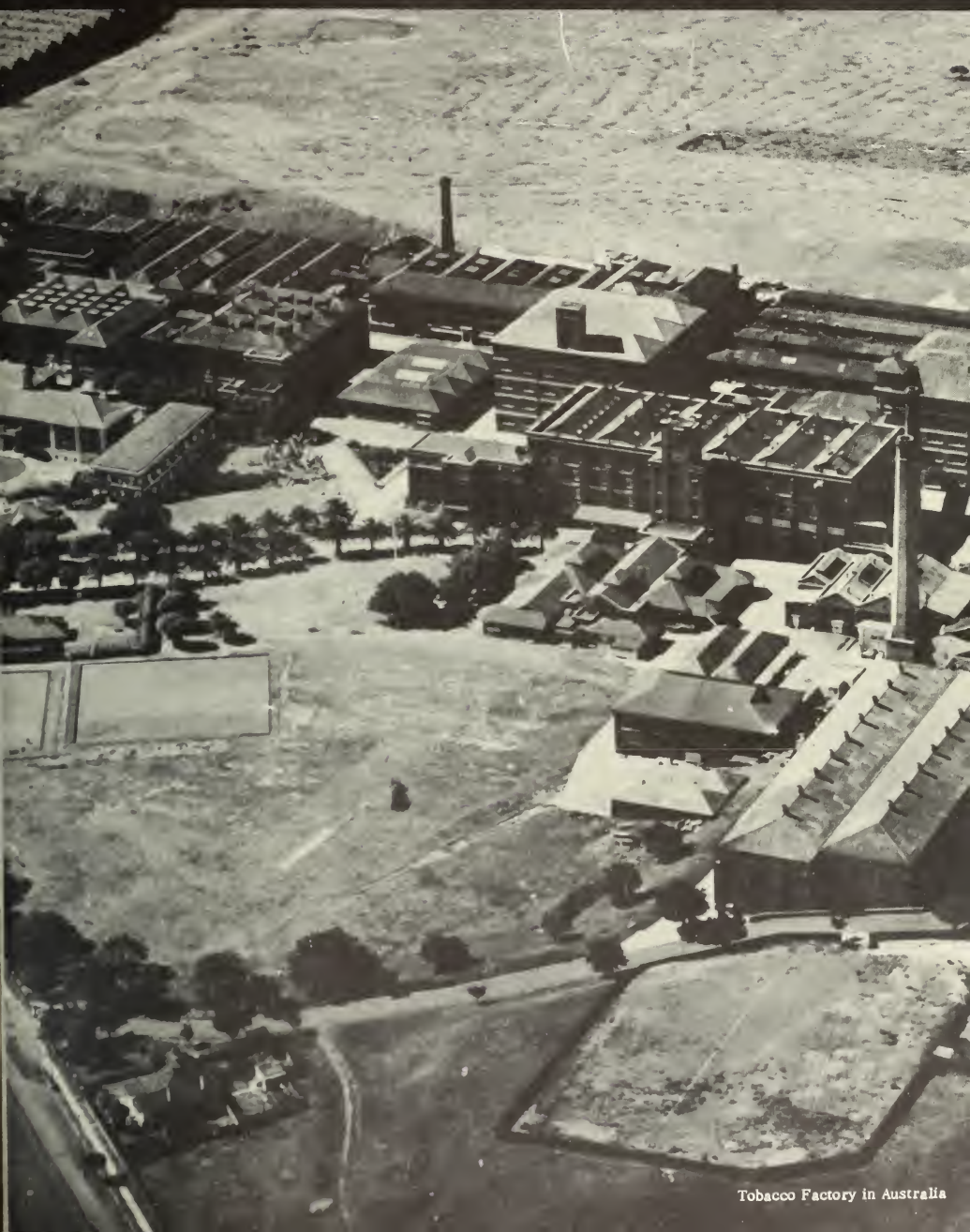
munist countries as to domestic production, imports or exports may be changed abruptly with little regard to the possible effects on producers or consumers in such areas.



Harvesting flue-cured near Guntur, Andhra State, in Southern India



Kongonese hanging rack-cured cigar tobacco near Dindigul, Andhra State, in Southern India.



Tobacco Factory in Australia

TONACCO, Manufactured: International trade, averages 1935-39 and 1945-49; annual 1952-55

Continent and Country	Average 1935-39			Average 1945-49			1952			1953			1954			1955 ¹		
	Exports	Imports	1,000 pounds	Exports	Imports	1,000 pounds	Exports	Imports	1,000 pounds	Exports	Imports	1,000 pounds	Exports	Imports	1,000 pounds	Exports	Imports	1,000 pounds
NORTH AND CENTRAL AMERICA:	16,492	4,317	---	17,002	3,636	---	30,350	1,677	---	28,489	1,097	---	25,030	1,111	---	24,380	1,000	---
	---	40	---	---	88	---	---	86	---	---	106	---	---	---	---	---	---	---
	---	495	---	2,201	---	---	---	3,079	---	---	1,275	---	---	---	---	---	---	---
	---	43	---	---	52	---	---	188	---	---	146	---	---	---	---	---	---	---
	1,894	210	---	3,851	1,857	---	4,037	3,661	---	3,661	146	---	---	---	---	---	---	---
	215	---	---	497	3,602	---	3,320	548	---	3,320	601	---	---	---	---	---	---	---
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	420,797	71,274	---	312,448	84,139	---	396,453	108,858	---	518,665	109,453	---	453,752	518,726	---	---	---	---
	27,712	---	---	32,649	---	---	39,507	36,177	---	---	---	---	42,364	47,727	---	---	---	---
	13,652	---	---	36,554	4,122	---	33,609	---	---	20,861	---	---	---	---	---	---	---	---
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	480,762	76,622	---	606,121	90,906	---	512,517	112,879	---	608,391	115,335	---	559,660	120,729	---	667,920	121,378	---
	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---
	4,162,954	4,16,924	---	4,13,542	---	---	21,439	1,075	---	1,075	22,761	---	16,713	2,056	---	---	---	---
	39,900	3,485	---	33,892	3,811	---	47,447	---	---	---	47,480	---	47,049	---	---	---	---	---
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20,706	4,695	---	18,893	852	---	22,306	153	---	153	20,880	---	24,048	---	---	---	---	---	
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4,21,282	---	---	1,0,090	---	---	16,227	17,253	---	17,253	13,779	---	7,1,407	---	---	---	---	---	
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4,204,664	---	---	64,001	---	---	73,230	3,187	---	3,187	62,365	---	98,341	---	---	---	---	---	
EUROPE:	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---
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TOBACCO. Unmanufactured: International trade, averages 1935-39 and 1945-49; annual 1952-55-Continued

Continent and Country	Average 1935-39		Average 1945-49		1952		1953		1954 ¹		1955 ¹	
	Exports	Imports	Exports	Imports	Exports	Imports	Exports	Imports	Exports	Imports	Exports	Imports
AFRICA:	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds
Algeria.....	1,979	4,482	4,637	4,317	2,798	4,605	2,798	4,605	2,798	4,605	2,798	4,605
Belgian Congo.....	—	4,321	4,253	4,969	24	4,245	24	4,245	2,107	4,781	2,107	4,781
French Morocco.....	—	1,000	1,118	4,330	252	3,792	183	7,686	9,770	6,773	9,770	6,773
Guinea.....	—	2,919	—	4,027	11	8,836	155	6,188	399	4,409	399	4,409
Nigeria.....	—	2,919	—	4,027	11	8,836	155	6,188	399	4,409	399	4,409
EGYPT.....	—	13,014	—	26,418	—	26,401	—	26,421	—	26,477	—	26,477
Gold Coast.....	—	1,471	—	1,397	—	1,799	—	1,566	—	1,305	—	1,305
Kenya.....	5,262	17	3,676	—	7,393	9,118	31	10,390	—	—	9,102	—
Central African Federation:												
Northern Rhodesia.....	1,429	—	4,151	4,151	9,033	6	—	—	—	—	—	—
Southern Rhodesia.....	327	—	20,921	4,151	7,759	—	—	—	—	—	—	—
Nyasaland.....	12,810	—	20,921	4,151	20,339	—	—	—	—	—	—	—
Union of South Africa.....	635	3,100	1,094	4,476	1,998	2,528	4,372	2,046	2,476	1,447	2,000	11,000
Total.....	64,281	36,094	99,970	58,192	151,444	70,521	155,591	72,389	181,787	66,822	181,706	72,546
OCIANA:												
Australia.....	114	23,153	79	25,893	—	32,133	—	35,420	—	38,268	—	51,799
New Zealand.....	113	3,027	—	5,738	—	6,764	—	5,140	—	17,139	—	57,109
Total.....	227	26,180	79	31,630	—	38,897	—	40,560	—	46,897	—	94
Total for comparable countries ²	1,035,812	974,720	1,084,052	915,178	1,166,133	1,046,686	1,201,957	1,139,879	1,290,798	1,178,740	1,389,425	1,245,497
Total for all countries.....	1,151,686	1,077,611	1,121,347	977,880	1,166,133	1,046,686	1,201,957	1,139,879	1,290,798	1,178,740	1,389,425	1,245,497

¹ Preliminary.² Includes Newfoundland.³ Excludes French possessions and official information.⁴ Less than a 2-year average.⁵ Re-exports.⁶ Includes manufactured tobacco.⁷ Includes manufactured tobacco.⁸ All Germany, 1935-39; Western Germany, only 1947 and subsequent years.⁹ Estimated on data for 6 months or more.¹⁰ Estimated on data for 6 months or more.¹¹ Vietnam only.¹² Fiscal year beginning April 1, 1935 to 1954. Calendar year 1955.¹³ Fiscal year beginning April 1, 1935 to 1954. Calendar year 1955.¹⁴ Year ending June 30, 1935-49. Calendar year thereafter.¹⁵ Excluding Bulgaria, Czechoslovakia, Poland, Hungary, Soviet Union and China.

INTERNATIONAL TOBACCO TRADE--1955

Free world exports of unmanufactured tobacco during 1955 were the largest of record, totaling some 1,389 million pounds. This was nearly 8 percent greater than for 1954 and 34 percent above the prewar (1935-39) average. (In order to make valid comparisons, the export trade of the countries now in the Soviet bloc, which is available for prewar years but not for most of the postwar period, has been excluded from the following analysis.)

Principal Exporting Countries

The United States last year again held first place among the world's tobacco exporting countries. United States exports totaled about 539 million pounds, up about 19 percent from the 454 million pounds shipped out in 1954. The value of unmanufactured tobacco exports from the United States last year was the highest of record, although the quantity has been exceeded in a number of prior years.

Most types of tobacco shared in the increase in United States leaf tobacco exports last year. Flue-cured exports, at 455 million pounds, were about 80 million pounds greater (about 21 percent) than in 1954. Flue-cured accounted for about 84 percent of total 1955 exports compared with 83 percent for the previous year. The share of the United States in free world tobacco exports last year was 39 percent compared with 35 percent in 1954, and 41 percent in the immediate prewar period.

Flue-cured tobacco continued to be the major kind exported by free world countries in 1955, accounting for one-half of the total amount exported. Important free world exporters of flue-cured tobacco, aside from the United States, were the Central African Federation, India and Canada.

Total exports of leaf tobacco from the Central African Federation (the Rhodesias and Nyasaland) in 1955 amounted to some 124 million pounds, down 6 percent from the previous year. However, the 1955 exports from the Federation, primarily flue-cured destined to other British Commonwealth countries, were almost four times as large as the 1935-39 average. Exports from India and Canada, the third and fourth ranking exporters of flue-cured leaf in the free world, also were larger than in 1954. India's total tobacco exports, at 87 million pounds, were 18 percent larger than in

1954. Canada's exports last year, at 48 million pounds, were approximately 50 percent larger than the previous year. Tobacco shipments from both India and Canada were far above prewar levels.

Exports from Greece in 1955, amounting to 121 million pounds, were about five million larger than in 1954. On the other hand, Turkey's exports last year fell some 10 million pounds below the high 1954 figure of 142 million pounds. These two countries, combined, supply the bulk of oriental tobacco moving in international trade. In recent years, exports from both of these countries have been well above the immediate prewar average level. In some post-war years, Turkey's tobacco export trade has been practically twice the average for 1935-39.

Aside from those previously mentioned, the following countries among the larger exporters increased their exports in 1955 as compared with 1954: Cuba, Dominican Republic, Yugoslavia and Algeria. Declines in the 1955 level of exports, in addition to those from Turkey and the Central African Federation, were noted for such major tobacco-exporting countries as Indonesia and Colombia.

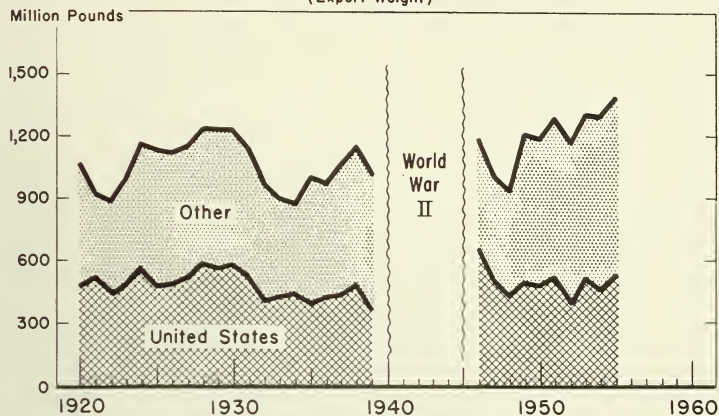
Principal Importing Countries

A number of importing countries increased their purchases of unmanufactured tobacco last year. Substantially larger imports were noted for the United Kingdom, West Germany, Philippine Republic and Australia. Moderate increases occurred in the cases of the United States, Austria, Belgium and Switzerland. Imports into such countries as Mexico, France, Denmark, the Netherlands and Sweden were below those for the previous year.

Exports for the countries reported in the accompanying table are consistently larger than imports for a number of reasons: (1) Some quantities of tobacco may appear twice in world export figures, i.e., as exports from the country of origin and as re-exports from the country of original destination, but may appear only as imports into the country of ultimate destination. (2) Free world exports to Soviet bloc countries are not shown as imports into the bloc countries, since Soviet bloc import data are not available. (3) A number of countries whose imports materially exceed exports are not included in the table.

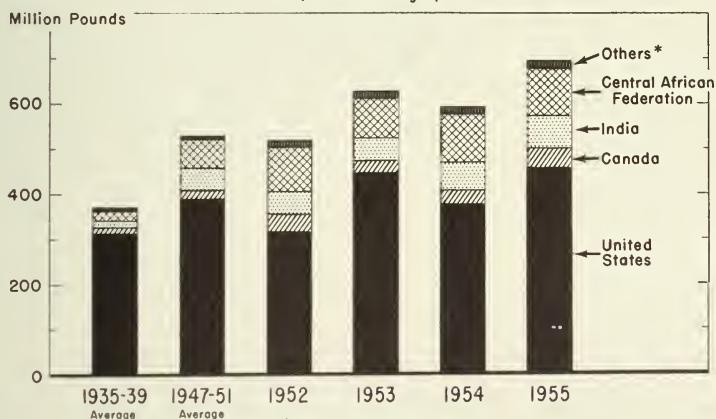
UNMANUFACTURED TOBACCO: UNITED STATES SHARE OF FREE WORLD EXPORT TRADE, 1920-55*

(Export Weight)



FREE WORLD EXPORTS OF FLUE-CURED TOBACCO: AVERAGES, 1935-39 & 1947-51; ANNUAL, 1952 THROUGH 1955

(Declared Weight)



Imports of unmanufactured tobacco into major importing countries, by principal countries of origin, averages 1935-39, and 1945-49; annual 1952-1955

Importing Country and Origin	Average		1952	1953	1954 ¹	1955 ¹
	1935-39	1945-49				
UNITED KINGDOM import from:	<i>Million pounds</i>	<i>Million pounds</i>	<i>Million pounds</i>	<i>Million pounds</i>	<i>Million pounds</i>	<i>Million pounds</i>
Southern Rhodesia.....	15.7	31.2	58.3	57.2	{ 62.8 14.0	{ 72.1 36.4
Nyasaland.....	12.4	13.2	11.8	10.9		
India Union.....	19.7	22.4	38.3	31.4	36.2	40.0
Canada.....	14.3	13.7	32.4	24.1	24.9	178.6
United States.....	200.8	260.7	66.8	174.1	159.7	3.1
Turkey.....	.6	7.2	.6	2.4	2.8	1.5
Greece.....	.6	3.6	1.0	.8	1.4	7.5
Netherlands.....	1.1	.3	9.1	9.7	6.8	4.6
Others.....	4.1	3.7	5.4	5.1	3.1	
Total.....	269.3	335.8	223.7	315.7	311.7	343.8
GERMANY import from:						
United States.....	13.8	34.0	53.7	53.5	54.4	58.8
Greece.....	44.3	5.2	14.9	21.6	28.4	34.1
Turkey.....	23.5	8.3	12.9	14.3	15.0	17.4
Brazil.....	27.7	4.0	12.1	10.9	10.8	10.4
Colombia.....	3.0	.9	5.2	4.8	5.3	5.7
Dominican Republic.....	3.0	.3	1.9	3.0	3.8	4.0
Indonesia.....	47.6	.3	6.0	6.8	8.2	8.5
Japan.....	(³)	(³)	.9	2.3	.1	1.7
Italy.....	.8	(³)	2.0	1.9	1.6	1.7
Southern Rhodesia.....	(³)	(³)	1.0	1.8	1.6	1.7
Yugoslavia.....	(³)	.1	.7	.8	.9	1.1
India.....	(³)	(³)	.4	.4	.4	1.4
Bulgaria.....	27.4	1.9	.2	.1	.1	4.1
Others.....	13.5	1.0	1.5	1.8	2.5	
Total.....	204.6	11 56.0	113.4	124.0	133.7	149.3
UNITED STATES import from:						
Turkey.....	20.6	43.9	55.0	56.9	56.0	57.7
Greece.....	19.1	6.3	14.5	14.3	15.6	17.9
Bulgaria.....	1.2	1.6	(³)	(³)	(³)	2.4
Israel and Syria.....	.8	3.6	3.9	3.3	2.9	1.5
Italy.....	3.0	(³)	1.2	1.2	1.9	1.5
Netherlands.....	1.5	(³)	(³)	(³)	(³)	(³)
Indonesia.....	.4	.9	.8	.4	.6	.3
Colombia.....	14.3	23.6	22.4	23.6	24.6	24.1
Philippine Republic.....	5.7	.3	1.2	2.3	1.4	2.5
Others.....	4.7	3.9	4.3	3.4	3.6	4.7
Total.....	71.3	84.1	102.9	105.4	106.4	111.3
FRANCE import from:						
United States.....	19.7	22.1	6.8	6.0	12.5	8.9
Brazil.....	1.2	8.4	3.5	1.3	3.1	6.2
Dominican Republic.....	1.1	5.2	2.4	1.2	.7	3.2
Colombia.....	1.8	1.8	1.0	1.1	2.8	2.1
Paraguay.....	(³)	.3	(³)	(³)	(³)	.6
Greece.....	1.7	2.0	14.2	8.1	15.0	8.9
Yugoslavia.....	.2	.7	8.6	6.0	6.0	7.6
Hungary.....	5.3	(³)	1.8	(³)	(³)	(³)
Bulgaria.....	.6	.5	(³)	(³)	(³)	(³)
Algeria.....	19.8	8.8	17.8	21.7	27.9	19.1
Madagascar.....	4.8	3.8	7.4	6.7	12.6	9.6
Turkey.....	(³)	4.8	5.5	4.1	5.8	6.1
French Cameroons.....	(³)	.3	.9	.9	2.7	2.4
Indonesia.....	2.7	(³)	.2	.3	.2	.6
Others.....	1.6	4.8	3.1	4.8	9.0	10.5
Total.....	59.0	64.0	73.2	62.2	98.3	85.8
NETHERLANDS import from:						
United States.....	17.9	24.6	18.9	25.5	34.0	23.5
Indonesia.....	26.5	2.4	7.7	8.7	13.3	8.1
Brazil.....	9.5	3.5	5.2	6.8	9.5	5.2
Greece.....	3.0	.3	1.1	1.3	2.1	2.7
Turkey.....	1.8	1.7	2.3	4.4	7.7	9.3
Others.....	8.7	12.8	23.6	25.6	21.4	15.0
Total.....	67.4	46.7	58.8	72.3	88.0	63.8
AUSTRALIA import from:						
United States.....	22.7	22.0	21.3	23.1	24.8	35.5
Indonesia.....	.2	(³)	(³)	(³)	(³)	(³)
Brazil.....	(³)	(³)	(³)	.1	(³)	(³)
Philippine Republic.....	.1	(³)	(³)	(³)	(³)	(³)
Cuba.....	(³)	.1	.1	(³)	.1	(³)
Turkey.....	(³)	3.6	7.8	9.1	10.6	12.1
Southern Rhodesia.....	(³)	.2	2.9	3.2	3.3	3.9
Others.....	.2					
Total.....	23.2	25.9	32.1	35.5	38.8	51.7
BELGIUM import from:						
United States.....	13.1	(³)	21.0	21.2	20.3	20.5
Indonesia.....	5.4	20.5	3.1	3.7	2.7	2.7
Netherlands.....	7.1	.4	.8	1.0	.9	1.7
Brazil.....	1.8	2.7	4.8	4.2	3.7	3.4

See footnotes at end of table.

Imports of unmanufactured tobacco into major importing countries, by principal countries of origin, averages 1935-39, and 1945-49; annual 1952-1955--Continued

Importing Country and Origin	Average		1952	1953	1954 ¹	1955 ¹
	1935-39	1945-49				
BELGIUM import from:--Continued	<i>Million pounds</i>	<i>Million pounds</i>	<i>Million pounds</i>	<i>Million pounds</i>	<i>Million pounds</i>	<i>Million pounds</i>
Turkey.....	4.0	1.4	3.8	4.1	4.4	3.0
Dominican Republic.....	.5	2.3	3.6	3.6	3.6	3.6
Italy.....	1.3	.1	(2)	.4	.7	1.2
Union of South Africa.....	.2	.1	(2)	.4	.4	
Argentina.....	.4	1.1	.1	.2	(3)	(3)
Cuba.....	.3	.1	.2	.2	.2	(3)
Paraguay.....	1.2	1.1	1.7	(3)	1.8	1.7
Philippine Republic.....	.4	(3)	.5	1.1	.6	.7
Bulgaria.....	.3	.3	.6	.6	.7	1.5
Greece.....	1.2	.1	.3	.3	.7	
Hungary.....	1.7	(3)	.3	.4	(3)	(3)
Others.....	6.1	3.8	6.2	6.9	5.5	7.9
Total.....	39.9	33.9	47.4	47.3	47.0	48.9
PHILIPPINE REPUBLIC import from:						
United States.....	1.1	.3	32.5	25.5	14.5	23.4
Others.....	(12)	(12)	(12)	(12)	(12)	(12)
Total.....	1.1	.3	32.5	25.5	14.5	23.4
DENMARK import from:						
United States.....	3.9	7.0	11.2	10.2	11.4	10.6
Brazil.....	(3)	4.9	3.5	4.7	4.7	4.6
Cuba.....	(3)	(3)	.3	.4	(3)	.4
Turkey.....	(3)	.5	.2	.6	.4	.4
Greece.....	.4	(3)	.1	(3)	(3)	.1
United Kingdom.....	2.2	(3)	(3)	(3)	(3)	(3)
Netherlands.....	10.7	(3)	.1	(3)	(3)	
Indonesia.....	(3)	.8	2.8	3.0	3.0	2.4
India.....	3.5	5.7	4.1	1.7	4.2	2.4
Others.....						
Total.....	20.7	18.9	22.3	20.9	24.0	21.3

Exports of unmanufactured tobacco from major exporting countries, by principal countries of destination, averages 1935-39, and 1945-49; annual 1952-1955

Exporting Country and Destination	Average		1952	1953	1954 ¹	1955 ¹
	1935-39	1945-49				
UNITED STATES export to:	<i>Million pounds</i>	<i>Million pounds</i>	<i>Million pounds</i>	<i>Million pounds</i>	<i>Million pounds</i>	<i>Million pounds</i>
United Kingdom.....	200.4	237.9	54.7	179.7	150.0	182.7
France.....	20.6	20.5	6.7	6.7	12.6	7.9
Netherlands.....	17.8	29.4	36.3	37.7	38.1	30.9
Spain.....	2.8	.4	.9	3.6	3.2	4.9
Ireland.....	7.1	16.0	16.4	17.5	14.1	12.8
Belgium-Luxembourg.....	12.5	18.3	15.6	12.9	12.5	24.8
Denmark.....	4.9	7.8	9.6	11.8	9.6	12.3
Norway.....	5.6	8.5	7.8	7.4	7.6	7.8
Portugal.....	4.8	9.1	5.1	7.4	7.4	6.9
Switzerland.....	4.3	12.1	10.7	11.9	11.7	10.8
West Germany ²	10.6	23.2	79.6	70.5	43.3	58.8
Sweden.....	8.4	11.5	13.0	10.2	9.6	11.3
Japan.....	5.3	--	7.4	9.5	6.7	17.5
Australia.....	19.9	20.6	24.0	26.7	28.2	31.6
India Union.....	2.9	11.0	5.8	1.2	1.3	2.9
Egypt.....	1.3	4.3	3.2	5.6	5.7	9.9
Mexico.....	.2	1.6	2.9	2.9	5.8	2.9
Philippines, Republic of.....	1.4	.3	29.7	20.9	19.5	21.1
New Zealand.....	5.0	5.6	5.4	9.8	6.6	7.6
Indonesia.....	2.2	2.7	13.6	13.0	10.3	9.9
China.....	49.1	26.8	(3)	(3)	(3)	(3)
Others.....	35.7	45.9	48.1	57.9	49.7	63.7
Total.....	420.8	513.5	396.5	518.7	453.6	538.6
TURKEY export to:						
United States.....	23.1	47.4	51.5	72.1	64.9	37.8
West Germany ²	30.9	9.0	22.5	22.3	14.1	17.4
East Germany ²	--	3.4	3.1	2.3	11.3	11.3
Poland.....	1.2	.4	.2	(3)	4.8	13.7
Hungary.....	.4	.3	5.7	2.2	2.4	3.2
Czechoslovakia.....	2.9	4.7	.6	3.5	4.1	5.6
Soviet Union.....	(3)	(3)	(3)	(3)	(3)	(3)
Yugoslavia.....	--	--	--	--	--	--
United Kingdom.....	.8	5.0	3.7	10.3	10.8	7.5
Italy.....	3.6	1.3	3.7	6.8	1.6	6.7
France.....	5.1	5.1	2.3	4.4	5.0	7.2
Austria.....	1.5	.7	4.1	3.6	2.1	3.0
Egypt.....	1.8	11.6	4.5	4.5	4.5	1.9
Belgium.....	1.6	2.3	5.5	5.7	3.5	(3)
Switzerland.....	.3	2.1	2.8	3.1	3.0	(3)
Sweden.....	.6	11.2	1.8	1.6	1.8	15.9
Others.....	6.1	13.7	13.7	10.7	6.0	
Total.....	75.5	105.4	125.4	158.1	142.0	132.3

See footnotes at end of table.

U.S. DEPARTMENT OF AGRICULTURE

Exports of unmanufactured tobacco from major exporting countries, by principal countries of destination, averages 1935-39, and 1945-49; annual 1952-1955--Continued

Exporting Country and Destination	Average		1952	1953	1954 ¹	1955 ¹
	1935-39	1945-49				
SOUTHERN RHODESIA* export to:	<i>Million pounds</i>	<i>Million pounds</i>	<i>Million pounds</i>	<i>Million pounds</i>	<i>Million pounds</i>	<i>Million pounds</i>
United Kingdom.....	15.3	33.2	55.2	71.2	77.5	68.0
Australia.....	(3)	3.6	7.3	8.2	11.2	11.0
Nigeria.....	(3)	.6	1.2	.8	2.2	1.7
Kenya.....	(3)	(3)	.1	.3	1.0	.6
Union of South Africa.....	2.5	3.2	1.8	1.9	1.4	11.2
Netherlands.....	.1	1.1	1.2	7.5	8.6	6.4
Denmark.....	(3)	2.1	3.5	1.6	4.5	1.6
Germany.....	.1	(3)	4.1	3.0	2.4	3.6
Belgian Congo.....	(3)	.3	1.0	5.1	6.7	3.0
Sweden.....	(3)	.4	.6	2.1	2.0	1.5
Belgium.....	.5	.5	1.5	1.2	1.5	1.8
Egypt.....	(3)	3.9	1.5	2.6	2.9	2.1
France.....	(3)	(3)	(3)	(3)	.7	.6
Austria.....	(3)	.2	.1	(3)	.6	.8
Norway.....	(3)	.2	.1	(3)	.6	.9
United States.....	(3)	1.3	.1	(3)	(3)	(3)
Others.....	.7	2.4	2.3	8.4	8.7	9.4
Total.....	19.2	52.8	88.4	113.9	132.5	124.2
GREECE export to:						
West Germany.....	48.0	3.8	40.9	34.8	37.9	41.7
East Germany.....				4.1	6.4	2.6
United States.....	19.7	12.6	13.8	13.3	14.4	22.7
France.....	1.7	3.0	13.0	9.8	11.5	13.3
Italy.....	2.3	3.8	1.5	3.5	9.0	7.9
Soviet Union.....	2.6	(3)	(3)	4.9	8.2	1.4
Austria.....	2.2	2.8	5.0	6.8	7.1	5.8
Finland.....	2.8	2.3	3.0	2.0	4.2	2.9
Egypt.....	2.0	2.0	2.3	2.8	2.8	2.8
United Kingdom.....	.7	4.3	2.1	3.7	2.8	2.8
Sweden.....	2.5	.9	3.0	2.0	1.0	1.0
Netherlands.....	(3)	2.0	.5	.7	1.3	1.3
Switzerland.....	.7	.7	2.2	2.2	2.9	3.5
Hungary.....	.7	(3)	(3)	4.2	2.4	3.9
Others.....	10.2	3.2	3.7	11.8	5.4	6.9
Total.....	97.7	4 39.9	91.3	107.9	116.2	121.3
INDIA UNION export to:⁶						
United Kingdom.....	20.0	26.3	33.5	30.1	31.1	28.4
Aden and Dependencies.....	6.1	4.3	3.1	7.2	6.4	5.5
Burma.....	6.3	.6	(3)	.3	.5	.1
Germany.....	(3)	.2	(3)	(3)	(3)	(3)
Sweden.....	(3)	1.4	(3)	1.0	(3)	(3)
Netherlands.....	.9	1.9	(3)	(3)	(3)	2.7
Belgium.....	(3)	1.7	(3)	(3)	(3)	2.2
Japan.....	2.4	.5	14.5	10.1	5.9	5.6
Hong Kong.....	.4	1.9	2.4	2.8	3.2	1.5
Ceylon.....	.3	.7	.9	.8	.3	.4
Egypt.....	(3)	2.1	2.0	1.8	2.2	2.2
China.....	4.8	7 .8	.4	1.6	10.1	20.9
Soviet Union.....	--	5.9	3.6	(3)	1.9	(3)
Pakistan.....	--	7.1	4.5	.6	(3)	(3)
Indonesia.....	(3)	(3)	(3)	(3)	.4	9.4
Others.....	2.3	6.8	15.4	14.8	12.0	7.8
Total.....	43.5	61.6	81.7	71.1	74.0	86.7
BRAZIL export to:						
Algeria.....	2.0	1.3	2.7	2.2	2.0	2.6
Argentina.....	10.8	11.3	--	--	--	--
Belgium and Luxembourg.....	1.4	3.7	2.8	2.0	3.0	2.4
Denmark.....	(3)	4.1	3.5	3.4	5.1	5.2
France.....	1.7	8.8	3	3.5	3.1	4.1
Germany.....	30.4	19.3	19.3	11.6	16.0	9.4
Morocco.....	(3)	1.9	.4	.6	1.6	.9
Netherlands.....	18.2	9.4	6.7	7.1	6.4	7.4
Spain.....	1.9	20.1	12.1	6.6	10.5	9.1
Sweden.....	.8	1.0	.8	1.1	.9	.2
Switzerland.....	.3	4.6	6.7	2.5	4.4	5.0
Uruguay.....	2.4	2.3	4.0	4.0	4.5	3.9
Others.....	1.2	6.2	7.8	7.0	4.4	11.9
Total.....	71.1	76.7	67.1	52.6	61.9	62.1
CANADA export to:						
United Kingdom.....	15.3	13.9	31.9	23.2	25.1	38.8
Australia.....	(3)	--	2.8	1.7	2.3	(3)
Trinidad.....	(3)	.9	1.4	1.4	1.2	3.1
Venezuela.....	(3)	.9	1.1	1.0	1.2	(3)
Netherlands.....	(3)	(3)	(3)	.3	.6	(3)
Belgium.....	(3)	(3)	(3)	(3)	.1	(3)
Germany.....	(3)	(3)	(3)	(3)	.5	(3)
Others.....	1.2	1.4	1.3	.9	1.0	6.5
Total.....	16.5	17.1	38.5	28.5	32.0	48.4

*Federation of Rhodesia and Nyasaland 1953-1955.

See footnotes at end of table.

Exports of unmanufactured tobacco from major exporting countries, by principal countries of destination, averages 1935-39, and 1945-49; annual 1952-1955--Continued

Exporting Country and Destination	Average		1952	1953	1954 ¹	1955 ¹
	1935-39	1945-49				
	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds
CUBA export to:						
Germany ²	3.5	1.0	.5	1.4	1.6	2.6
Netherlands.....	1.1	.7	.5	1.1	1.0	3.1
Spain.....	5.2	4.8	10.7	2.4	8.6	8.6
Sweden.....	.6	.4	.2	.6	.1	
United States.....	13.9	21.4	22.7	25.4	25.5	27.1
Argentina.....	1.0	.1	(³)	(³)	(³)	
Chile.....	.2	.6	.4	.4	.4	.3
Uruguay.....	.3	.4	.6	1.0	1.1	1.1
Canada.....	.3	.8	.3	.4	.4	.3
Others.....	1.6	2.4	3.6	3.5	3.7	4.6
Total.....	27.7	32.6	39.5	36.2	42.4	47.7
DOMINICAN REPUBLIC export to:						
France.....	2.4	5.8	1.4	1.3	2.2	2.3
Netherlands.....	4.6	7.4	2.9	2.4	1.7	2.8
Spain.....	.6	10.6	11.5	.1	4.4	5.5
Belgium.....	1.2	4.6	3.2	3.2	4.8	4.1
Spanish Morocco.....	(³)	2.2	(³)	(³)	(³)	(³)
French Morocco.....	(³)	.9	.2	.4	1.4	.9
Canary Islands.....	(³)	.9	.2	.6	.5	.5
United States.....	(³)	.9	(³)	(³)	(³)	
Algeria.....	.8	1.6	2.5	2.7	2.9	2.7
Switzerland.....	(³)	.3	.3	.1	.1	
Indonesia.....	(³)	.7	2.6	3.3	.7	.7
Gibraltar.....	(³)	.6	1.2	2.3	1.5	2.0
Others.....	4.1	2.2	7.3	4.5	7.0	7.2
Total.....	13.7	38.5	33.6	20.9	27.2	28.9
ITALY export to:						
Switzerland.....	2.1	.3	1.0	1.6	1.9	2.4
United States.....	1.3	.5	1.6	2.2	1.8	1.8
United Kingdom.....	(³)	.3	(³)	(³)	.5	1.3
Belgium and Luxembourg.....	1.7	.3	.6	3.1	1.9	(³)
Germany ²	2.4	1.0	2.7	3.1	2.5	5.1
Netherlands.....	.2	(³)	(³)	(³)	2.2	3.1
France.....	(³)	.1	.3	(³)	1.7	2.0
Egypt.....	(³)	1.1	(³)	6.0	10.0	2.9
Soviet Union.....	(³)	1.1	7.1	11.4	5.4	6.6
Others.....	5.1	1.0				
Total.....	12.9	4 4.6	17.3	27.4	27.9	25.2
PHILIPPINE REPUBLIC export to:						
Spain.....	14.5	5.8	20.0	17.8	17.5	6.0
United States and Territories.....	6.4	.6	3.2	2.8	1.4	1.8
China.....	.5	.4	(³)	(³)	(³)	(³)
Indonesia.....	.1	.1	1.5	1.6	1.0	(³)
Belgium.....	.3	.3	.8	1.8	.9	.5
French Africa.....	.8	.2	.1	.4	.3	.2
Italy.....	2.6	(³)	.2	(³)	(³)	(³)
Netherlands.....	4.4	(³)	.1	1.6	.1	(³)
Japan.....	2.1	(³)	(³)	(³)	(³)	(³)
Korea.....	2.1	(³)	(³)	(³)	(³)	(³)
France.....	1.0	(³)	(³)	.1	.8	.8
Others.....	2.6	.5	.2	.2		
Total.....	37.4	4 7.9	26.1	26.3	22.0	9 9.3

¹ Preliminary.

² Germany--all Germany 1935-1947; Western Germany only for subsequent years.

³ If any, included in others.

⁴ Less than a 5-year average.

⁵ Includes 5.0 million pounds to Yugoslavia.

⁶ Fiscal year beginning April 1, 1935-1954. Calendar year 1955.

⁷ Excluding Hong Kong and Macao.

⁸ One year 1949-50, 760,000 pounds.

⁹ Nine months only.

¹⁰ Federation of Rhodesia and Nyasaland.

¹¹ Two years only, 1948 and 1949.

¹² Less than 500,000 pounds.

¹³ Eight months, August 1955.

FREE WORLD OUTPUT OF TOBACCO PRODUCTS¹

The output of tobacco products in the free world in 1954 is estimated at about 4.0 billion pounds--.7 billion pounds greater than the 1935-39 average of 3.3 billion pounds. Cigarette output has more than doubled at the expense of other products and accounts for about 65 percent of total output as compared with 35 percent prewar. The greatest decline has occurred in the combined production of such products as

water pipe tobacco, tobacc, kerf and hookah produced in the Near and Far East Asiatic countries.

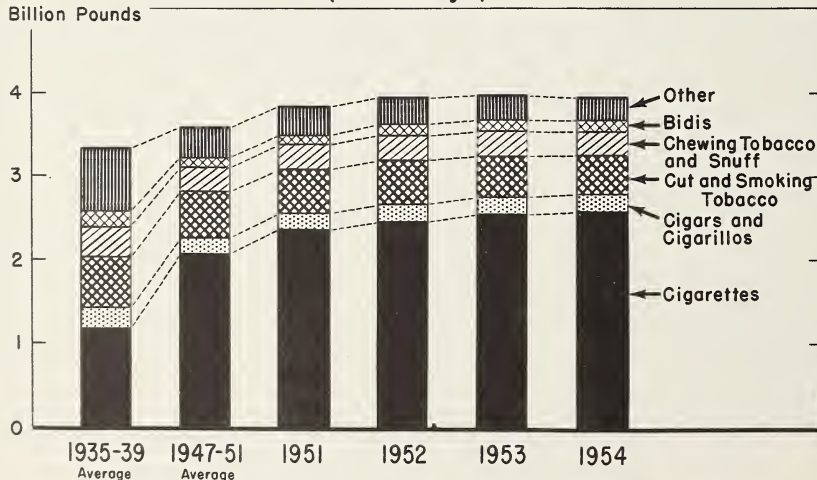
In the total aggregate, the United States is by far the most important producer and its proportion of free world output increased from about 23 percent from prewar to about 28 percent in 1954. Other major producers in rank of importance include India, the United Kingdom, Japan, West Germany, France and Italy. The combined production of these major producers in 1954 represented about 63 percent of total free world output.

Cigarettes

Cigarette output in the free world has increased from the prewar annual average of 529 billion pieces to 1,172 billion in 1954. Output of cigarettes is expected to continue upward and probably approximated 1,200

¹Industrial production of tobacco products of countries now in the Soviet bloc, including Communist China, was omitted in the accompanying tabulations because the reliability of such available data is questionable. This analysis was limited to 1954 and prior years since data for 1955 are not available for the majority of the countries shown.

**ESTIMATED FREE WORLD OUTPUT OF TOBACCO PRODUCTS
BY KINDS: AVERAGES, 1935-39 AND 1947-51;
ANNUAL, 1951 THROUGH 1954***
(Product Weight)



*Excludes industrial production of countries now in Soviet bloc.

CIGARETTES: Estimated output in specified countries^a

Continent and Country	Average ^a 1935-39	Average 1947-51	1951	1952	1953	1954
NORTH AMERICA:						
United States.....	Million pieces 164,239	Million pieces 390,460	Million pieces 418,802	Million pieces 435,549	Million pieces 423,070	Million pieces 401,856
Canada.....	6,344	16,134	15,667	17,848	21,002	22,113
Puerto Rico.....	76	76	1	1	4	1
Mexico.....	17,935	24,058	27,116	26,936	26,649	30,721
Guatemala.....	583	1,446	1,608	1,650	1,550	1,673
El Salvador.....	365	540	675	742	807	720
Honduras.....	184	852	892	711	721	740
Nicaragua.....	218	522	553	849	667	724
Costa Rica.....	392	833	892	924	969	4 990
Haiti.....	1,035	1,190	1,225	1,295	1,295	1,550
Cuba ^a	4,665	7,870	8,314	8,951	8,720	9,340
Jamaica.....	293	432	460	522	533	4 550
Dominican Republic.....	216	691	782	869	896	892
Trinidad and Tobago.....	310	372	391	632	646	682
Total North America.....	196,770	445,453	477,295	497,413	487,528	472,957
SOUTH AMERICA:						
Colombia.....	3,922	9,172	11,650	11,294	11,610	4 11,900
Venezuela.....	1,991	2,964	2,064	2,482	2,725	2,995
Ecuador.....	594	730	782	764	743	4 760
Surinam.....	9	47	51	61	63	4 68
Peru.....	753	1,940	2,089	2,075	2,280	2,421
Bolivia.....	595	518	518	481	422	4 450
Chile.....	3,045	5,074	4,929	5,193	5,382	5,466
Brazil.....	13,411	32,092	36,500	40,400	42,000	45,000
Uruguay.....	1,686	1,303	1,582	1,545	1,605	11,732
Paraguay.....	207	420	523	537	529	512
Argentina.....	8,949	19,179	19,850	21,050	21,750	21,218
Total South America.....	33,462	72,445	80,518	85,882	89,124	92,435
EUROPE:						
Sweden.....	1,864	3,321	4,288	4,487	4,465	4,460
Norway.....	802	1,392	1,232	1,344	1,305	1,290
Denmark.....	1,451	3,228	3,525	3,914	3,982	3,887
United Kingdom.....	77,928	106,304	111,313	110,542	110,814	111,732
Ireland.....	2,712	4,894	6,438	5,948	5,928	4 5,860
Netherlands.....	4,042	6,819	8,844	9,066	9,956	10,790
Belgium & Luxembourg.....	5,767	8,391	9,115	8,705	8,760	8,804
Western Germany.....	27,011	38,656	37,501	36,851	39,834	39,834
France.....	18,097	29,486	35,570	33,753	37,159	40,778
Austria.....	4,878	4,982	6,711	7,056	7,110	6,409
Switzerland.....	6,201	7,602	7,602	7,942	7,942	7,942
Finland.....	3,920	4,462	5,184	5,184	5,171	5,522
Spain.....	7,484	9,845	9,682	11,538	12,707	4 13,860
Portugal.....	949	2,966	3,244	3,612	3,604	3,637
Italy.....	16,993	26,596	30,423	33,760	37,243	38,615
Yugoslavia.....	4,527	16,483	13,850	12,240	14,550	15,598
Sear.....	N.A.	961	1,218	1,299	1,387	4 1,475
Greece.....	5,399	9,323	9,780	9,767	10,081	10,186
Turkey.....	9,219	16,338	17,215	18,831	20,563	23,706
Total Europe.....	195,394	280,623	314,562	320,179	339,413	354,399
ASIA:						
Israel.....	712	1,270	2,027	2,049	2,019	2,005
Syria.....	1,159	1,449	1,449	1,773	1,644	4 1,735
Lebanon.....	595	880	930	900	955	4 1,010
Iran.....	2,933	4,083	4,112	4,972	5,156	5,772
India.....	7,500	21,535	21,499	20,199	19,834	20,635
Pakistan.....	(4)	1,482	2,716	3,170	3,996	4,588
Ceylon.....	4 950	1,297	1,694	1,670	1,648	1,648
Jordan.....	N.A.	219	328	353	378	4 403
Burma.....	N.A.	4	34	4	28	4 34
Thailand.....	1,424	4,210	6,688	7,485	6,840	7,092
Indochina (Vietnam, Laos and Cambodia).....	4 3,000	4 4,900	5,620	6,179	6,610	5,668
British Malaya.....	500	1,000	4 1,200	4 1,200	4 1,400	4 1,400
Indonesia.....	11,259	9,471	9,471	12,218	14,295	16,000
Philippine Republic.....	3,137	4,350	9,014	11,164	13,216	14,850
Korea, Republic of.....	8,670	4,940	7,000	10,003	10,978	10,978
Japan (Formosa).....	1,224	3,689	7,646	8,432	8,432	4 9,250
Japan.....	44,234	50,377	75,033	84,436	90,076	97,901
Total Asia.....	86,851	113,141	154,888	175,364	187,504	202,084
OCEANIA:						
Australia.....	2,840	4,622	5,195	6,295	8,302	9,553
New Zealand.....	366	1,723	2,119	2,252	2,330	2,230
Total Oceania.....	3,206	6,345	7,314	8,547	10,632	11,783
AFRICA:						
French Morocco.....	976	2,511	2,715	2,790	2,829	2,527
Algeria ^a	2,418	3,872	3,655	3,951	3,913	4 3,913
Tunisia.....	934	1,617	1,737	1,768	4 1,800	4 1,800
Egypt.....	3,500	9,150	9,150	8,500	7,850	7,950
Nigeria.....	173	893	1,397	1,932	2,150	4 2,350
Angola.....	75	368	461	523	561	4 595
Belgian Congo.....	N.A.	1,121	1,431	1,666	2,171	2,351
Ethiopia.....	52	75	65	83	95	102

See footnote at end of tables.

U.S. DEPARTMENT OF AGRICULTURE

CIGARETTES: Estimated output in specified countries--Continued

Continent and Country	Average ² 1935-39	Average 1947-51	1951	1952	1953	1954
AFRICA:--Continued	Million pieces	Million pieces	Million pieces	Million pieces	Million pieces	Million pieces
Mauritius.....	310	491	564	536	559	539
Norfolk Island.....	268	607	650	640	690	730
Union of South Africa.....	4,277	8,962	9,510	9,537	9,739	10,112
Uganda.....	N.A.	1,968	2,475	2,634	2,804	2,975
Kenya.....	N.A.	24	61	88	98	104
Tanganyika.....	40	37	2	1	--	--
French West Africa.....	N.A.	N.A.	N.A.	350	600	750
Total Africa.....	13,023	32,122	33,856	34,924	36,427	38,315
Total countries shown.....	528,706	950,129	1,068,433	1,122,309	1,150,628	1,171,573

CIGARS: Estimated output in specified countries⁷

NORTH AMERICA:						
United States.....	5,075	5,516	5,804	6,051	6,128	6,023
Canada.....	128	200	169	202	236	244
Puerto Rico.....	83	73	69	72	76	101
Mexico.....	18	25	29	29	29	28
Guatemala.....	80	78	71	67	65	63
Cuba.....	110	340	327	353	330	275
Jamaica.....	6	42	20	20	19	19
Dominican Republic.....	26	38	45	42	38	33
Total North America.....	5,526	6,312	6,534	6,836	6,921	6,786
SOUTH AMERICA:						
Colombia.....	815	1,016	1,059	1,014	938	797
Venezuela.....	N.A.	72	71	73	69	67
Ecuador.....	47	19	12	13	10	4
Surinam.....	1	1	1	1	1	1
Peru.....	2	2	2	2	2	2
Chile.....	7	4	3	3	2	2
Brazil.....	179	161	225	191	200	216
Paraguay.....	7	6	6	6	6	6
Uruguay.....	13	8	6	7	7	7
Argentina.....	606	488	441	509	425	410
Total South America.....	1,675	1,778	1,826	1,818	1,659	1,517
EUROPE:						
Sweden.....	220	151	121	133	121	115
Norway.....	24	16	11	12	12	13
Denmark.....	870	806	688	780	812	829
United Kingdom.....	85	61	57	62	60	60
Netherlands.....	1,541	950	811	899	1,187	1,217
Belgium & Luxembourg.....	763	340	379	446	522	585
France.....	116	93	122	128	120	129
Western Germany.....	5 7,665	2,833	4,542	4,639	4,469	4,385
Austria.....	120	63	66	76	76	76
Switzerland.....	479	303	473	482	497	488
Finland.....	18	11	12	12	12	12
Spain.....	389	102	128	128	127	125
Portugal.....	6	1	1	1	1	1
Italy.....	826	676	531	523	450	422
Yugoslavia.....	30	12	15	18	21	25
Sear.....	N.A.	13	18	30	33	37
Total Europe.....	13,152	6,631	7,975	8,365	8,520	8,521
ASIA:						
Israel.....	4	1	1	(⁸) 1	(⁸) 1	(⁸) 1
Iran.....	N.A.	27	1	(⁸) 1	(⁸) 1	(⁸) 1
India.....	1,155	589	712	622	630	470
Pakistan.....	(⁸)	(⁸)	(⁸)	1	1	2
British Malaya.....	N.A.	N.A.	N.A.	N.A.	4 175	4 175
Indonesia.....	882	4 650	4 700	4 725	4 750	4 775
Taiwan (Formosa).....	1	(⁸)	(⁸)	(⁸)	(⁸)	(⁸)
Japan.....	2	(⁸)	(⁸)	(⁸)	(⁸)	(⁸)
Philippine Republic.....	313	85	91	85	96	89
Total Asia.....	2,357	1,352	1,505	1,434	1,653	1,560
OCEANIA:						
Australia.....	34	23	24	18	19	20
New Zealand.....	N.A.	1	1	1	1	1
Total Oceania.....	34	24	25	19	20	21
AFRICA:						
Algeria.....	2	1	1	1	1	1
Tunisia.....	3	2	3	3	4	4
Belgian Congo.....	N.A.	(⁸)	(⁸)	(⁸)	4	4
Union of South Africa.....	10	6	5	5	4	4
Total Africa.....	15	9	9	9	9	9
Total countries shown.....	22,759	16,106	17,874	18,481	18,782	18,434

See footnotes at end of tables.

WORLD TOBACCO ANALYSIS

29

CUT AND SMOKING TOBACCOS: Estimated output in specified countries^a

Continent and Country	Average ^a 1935-39	Average 1947-51	1951	1952	1953	1954
NORTH AMERICA:	<i>1,000 pounds</i>	<i>1,000 pounds</i>	<i>1,000 pounds</i>	<i>1,000 pounds</i>	<i>1,000 pounds</i>	<i>1,000 pounds</i>
United States.....	195,300	105,880	101,300	96,800	86,600	83,700
Canada.....	22,060	25,844	27,297	30,927	26,142	24,459
Mexico.....	146	105	100	83	79	72
El Salvador.....	N.A.	N.A.	N.A.	1,110	1,172	1,080
Cuba.....	N.A.	149	155	163	168	1,261
Dominican Republic.....	N.A.	2,337	2,156	2,427	1,746	
Total North America.....	217,655	134,313	131,008	131,565	115,797	110,640
SOUTH AMERICA:						
Ecuador.....	867	1,758	2,675	⁴ 2,700	⁴ 2,750	⁴ 2,800
Chile.....	732	332	337	361	339	324
Brazil.....	2,773	⁴ 3,000	⁴ 3,050	⁴ 3,100	⁴ 3,150	⁴ 3,200
Uruguay.....	4,663	4,678	4,466	4,907	4,733	4,500
Argentina.....	8,594	19,617	22,640	23,897	17,869	⁴ 20,000
Peru.....	867	1,758	1,859	1,545	2,408	⁴ 2,750
Total South America.....	18,496	31,143	35,032	36,510	31,249	33,504
EUROPE:						
Sweden.....	2,235	2,799	2,815	3,036	3,081	3,103
Norway.....	5,273	5,267	5,423	5,681	5,791	5,923
Denmark.....	5,817	5,999	5,505	5,785	5,732	5,820
United Kingdom.....	51,150	41,652	38,892	38,993	37,893	37,360
Ireland.....	3,573	3,054	3,530	2,590	2,498	⁴ 2,400
Netherlands.....	28,773	23,841	24,595	25,377	24,188	23,700
Belgium & Luxembourg.....	28,870	21,970	23,668	22,856	22,436	21,466
France.....	64,307	49,681	46,877	43,616	40,159	39,297
Western Germany.....	63,276	33,023	45,500	40,164	38,364	34,692
Austria.....	8,978	2,116	3,193	3,061	2,899	2,844
Switzerland.....	5,810	5,346	5,347	5,271	5,226	5,005
Spain.....	1,895	1,396	1,355	1,272	1,182	1,048
Finland.....	38,991	37,271	35,926	45,427	27,483	⁴ 27,000
Portugal.....	3,830	3,509	3,000	3,062	2,745	2,437
Italy.....	13,687	12,124	12,439	11,398	12,103	13,000
Yugoslavia.....	6,332	2,485	N.A.	N.A.	364	661
Turkey.....	7,481	5,657	5,617	5,833	5,816	7,033
Sear.....	N.A.	787	732	705	680	⁴ 650
Total Europe.....	336,878	257,977	263,999	262,885	238,580	233,339
ASIA:						
Jordan.....	N.A.	16	7	9	9	⁴ 9
Lebanon.....	489	732	708	514	705	⁴ 700
Israel.....	41	52	4	11	4	
Syria.....	1,579	1,430	1,232	1,663	1,945	⁴ 2,250
India.....	10,824	7,189	6,553	7,460	7,002	6,755
Indochina (Vietnam, Laos and Cambodia).....	7,361	8,945	12,853	15,088	16,931	⁴ 17,500
Philippine Republic.....	325	352	368	411	390	390
Korea.....	31,879	13,613	9,758	16,493	9,894	7,209
Taiwan (Formosa).....	2,055	506	295	37	134	150
Japan.....	44,709	36,263	23,513	19,526	15,490	14,093
British Malaya.....	N.A.	N.A.	N.A.	N.A.	⁴ 1,550	3,277
Indonesia.....	1,168	7	5	174	518	750
Total Asia.....	100,530	68,945	55,281	61,334	54,600	53,095
OCEANIA:						
Australia.....	15,829	20,061	21,904	22,334	23,400	21,060
New Zealand.....	2,879	4,920	5,456	5,351	5,671	5,665
Total Oceania.....	18,708	24,981	27,360	27,685	29,071	26,725
AFRICA:						
French Morocco.....	1,264	1,452	1,997	1,745	1,842	1,776
Algeria.....	2,782	2,155	2,137	2,253	2,174	2,163
Tunisia.....	1,113	772	719	686	⁴ 650	⁴ 625
Angola.....	132	142	163	149	170	170
Egypt.....	6,850	7,580	7,400	7,175	6,880	7,150
Belgian Congo.....	N.A.	8	11	14	18	⁴ 20
Mauritius.....	N.A.	7	7	6	5	5
Mozambique.....	N.A.	7	7	6	9	9
Union of South Africa.....	10,999	17,042	16,887	18,425	18,250	20,154
Ghana.....	1,478	629	672	726	726	699
Kenya.....	N.A.	N.A.	11	35	16	11
Tanganyika.....	143	11	11	11	8	8
Total Africa.....	18,613	29,804	30,046	31,234	30,448	32,816
Total countries shown.....	610,350	547,163	542,726	551,213	499,745	490,119

CHEWING TOBACCOS AND SNUFF: Estimated output in specified countries

NORTH AMERICA:						
United States.....	148,700	131,760	125,900	123,700	122,900	120,000
Canada.....	3,560	3,316	2,880	2,675	2,590	2,387
Dominican Republic.....	2,879	3,050	2,350	1,950	1,747	1,742
Total North America.....	155,139	138,126	131,130	128,325	127,237	124,129

See footnotes at end of tables.

CHEWING TOBACCO AND SNUFF: Estimated output in specified countries--Continued

Continent and Country	Average 1935-39	Average 1947-51	1951	1952	1953	1954
SOUTH AMERICA:	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds
Argentina.....	16	12	15	11	13	4 15
Total South America.....	16	12	15	11	13	15
EUROPE:						
Sweden.....	9,870	7,118	6,552	6,618	6,532	6,487
Norway.....	2,302	2,022	1,903	1,874	1,815	1,740
Denmark.....	2,578	2,165	1,967	1,942	1,936	1,878
United Kingdom.....	1,045	739	699	754	760	750
Ireland.....	200	141	123	114	112	108
Belgium & Luxembourg.....	1,197	687	658	511	596	458
France.....	5,812	3,117	2,633	2,791	2,665	2,382
Western Germany.....	11,994	3,389	3,262	2,855	2,971	2,530
Austria.....	787	222	326	289	262	229
Switzerland.....	45	26	43	42	47	42
Finland.....	192	119	156	158	162	152
Spain.....	27	32	29	4 30	4 30	4 30
Portugal.....	55	26	22	20	18	15
Italy.....	2,591	1,392	1,599	1,407	1,248	1,238
Yugoslavia.....	58	N.A.	N.A.	N.A.	N.A.	N.A.
Turkey.....	7	4	4	3	3	4 3
Total Europe.....	38,715	21,218	19,946	19,408	18,757	18,053
ASIA:						
Israel.....	18	N.A.	47	48	55	62
India ¹	165,000	133,160	132,560	137,780	139,750	140,950
Philippine Republic.....	362	230	696	517	542	529
Total Asia.....	165,380	133,390	133,303	138,345	140,347	141,541
AFRICA:						
French Morocco.....	282	N.A.	N.A.	864	822	789
Algeria.....	907	2,029	2,371	2,502	2,793	3,051
Tunisia.....	683	516	819	888	920	4 950
Mauritania.....	N.A.	N.A.	N.A.	6	5	5
Union of South Africa.....	2,524	3,580	3,977	4,170	4,064	4,153
Egypt.....	1,250	860	280	275	265	250
Total Africa.....	5,646	6,985	7,447	8,705	8,869	9,200
Total countries shown.....	364,892	299,731	291,841	294,794	295,223	292,938

BIDIS: Estimated output in specified countries¹⁰

Country	Average 1935-39	Average 1947-51	1951	1952	1953	1954
	Million pieces	Million pieces	Million pieces	Million pieces	Million pieces	Million pieces
Ceylon.....	N.A.	N.A.	N.A.	72	49	62
India ¹	180,000	91,850	102,400	120,200	114,800	117,700
Pakistan.....	(²)	10,500	11,500	11,900	12,300	12,872
Total countries shown.....	180,000	102,350	113,900	132,172	127,149	130,637

OTHER MANUFACTURED PRODUCTS: Estimated output in specified countries¹¹

	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds
Iran.....	4,325	3,138	1,929	4,202	3,752	4,634
Israel.....	144	68	87	71	75	82
Turkey.....	181	141	139	137	134	4 130
Syria.....	540	309	290	264	291	4 320
India ¹	640,000	167,800	142,200	163,600	145,000	132,900
Pakistan.....	(²)	140,000	135,000	125,000	125,000	120,000
Egypt.....	611	506	520	480	450	430
Indonesia.....	100,010	50,000	46,200	42,500	38,500	34,600
Total countries shown.....	745,811	361,962	326,365	341,254	313,202	293,096

¹ Conversion factor of 2.2046 pounds equals 1,000 pieces was used where countries reported production in terms of pounds or metric tons.² The prewar annual average of 1935-39 applies to the majority of the countries shown, but for some countries the data were not available for these particular years. Such averages as 1937-41 and 1938-42 were used. However, for Spain a pre-civil war average of 1931-35 was used.³ Consumption, as output data are not available.⁴ F.A.S. estimates, based on trends.⁵ 1938 only. Area comparable to what is known as Western Germany since World War II.⁶ Included in India.⁷ Conversion factor of 10.47 pounds equals 1,000 pieces was used where countries reported production in terms of pounds or metric tons. Cigar figures include cigarillos and cheroots.⁸ Less than 500,000 pieces.⁹ Includes quantities for "roll-your-own" cigarettes.¹⁰ Conversion factor of 1.0 pounds equals 1,000 pieces where countries reported production in terms of pounds or metric tons.¹¹ Includes water pipe tobacco, tobacco, kerr and hookah.

billion in 1955. The United States ranks first in order of importance and is followed by the United Kingdom, Japan, Brazil, France, West Germany, Italy and Mexico.

Cigarette production of countries now in the Soviet bloc, including Communist China, averaged about 250 billion pieces prewar. Output of cigarettes in 1954, based on secondary information, may have approximated 525 billion.

Cigars and Cigarillos

Cigar output during 1952-54 averaged 18.6 billion pieces, or about 20 percent below the prewar annual average of 22.8 billion pieces. Most of the decline occurred in the continents of Western Europe and Asia. The principal producers of cigars include the United States, West Germany, the Netherlands, Denmark, Colombia, Indonesia, Belgium, Switzerland, India, Italy, Cuba and Canada. These countries during 1954 accounted for about 85 percent of total cigar production.

Cut and Smoking Tobaccos

In the total aggregate, the output of cut and smoking tobaccos continues to decline, but the trend in some countries does not conform to the over-all downward decline. For such countries as Canada, Spain, Uruguay and Argentina, the output continued upward through 1952, then began to decline. In such countries as Sweden, Norway, Syria, Indochina (Vietnam, Laos, and Cambodia), Australia, New Zealand, Egypt and the Union of South Africa, output of smoking tobaccos continues to rise. There are a number of countries, including Denmark and Italy, whose production is approximately the same as prewar. The decline in output of cut and smoking tobaccos has been the greatest in the cases of the United States, the United Kingdom, the Netherlands, Belgium, France, Japan, West Germany, Korea, Taiwan, Austria, Portugal, Ireland and Iran. The combined output of those accounted for about 90 percent of prewar production in contrast to 57 percent in 1954.

Chewing Tobaccos and Snuff

The output of chewing tobaccos and snuff combined is about 20 percent below the prewar annual average of 365 million pounds. Output of these products show a downward trend for all countries except Algeria, Tunisia, and the Union of South Africa. Since 1951, the output of these products in

India has turned upward but is still below the prewar level. The principal producers of these products include the United States, Sweden, India, Algeria, Union of South Africa, West Germany, France, Canada, Norway, Denmark, Italy and the Dominican Republic, whose combined production accounts for 99 percent of the total.

Other Products

The output of bidis is confined to Ceylon, India and Pakistan, whose combined production is increasing following World War II, but is still below the prewar level of 180.0 billion pieces. The combined 1954 output of the other products, such as water pipe tobacco, tombac, kerf and hookah, was about 60 percent below the prewar annual average of 745.8 million pounds. Production of hookah is primarily confined to India and Pakistan; whereas, kerf is produced largely in Indonesia.

FREE WORLD TOBACCO TRADE WITH SOVIET BLOC¹

Summary

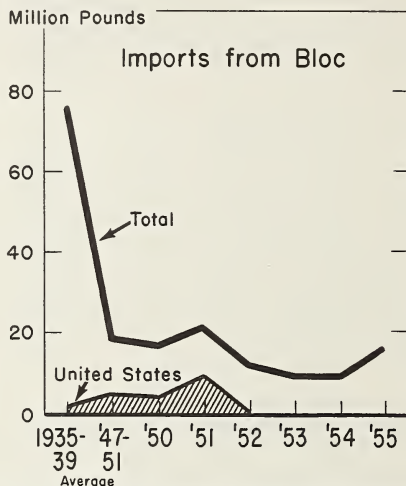
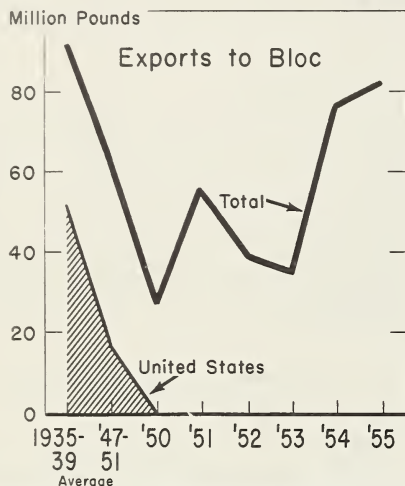
Demand for unmanufactured tobacco by the Soviet bloc from the free world reversed its downward trend in 1954 and rose moderately in 1955. Imports from the free world are expected to continue upward due to a net shortage of leaf and because certain types and qualities of leaf are required for blending with domestic tobaccos produced in bloc countries.

Trade arrangements (barter, bilateral, compensation and trade and payments agreements) are assuming an increasingly important role in leaf tobacco exports from certain free world countries to the Soviet bloc in exchange for manufactured goods. T.is appears to be part of an overall plan by the Communist countries to purchase agricultural products from the free world to supplement domestic shortages within the bloc countries themselves. At the same time, this exchange of goods expands Communist influence in free world countries,

¹The following analysis of Soviet bloc tobacco trade is based upon free world exports to, and imports from, the bloc countries. This procedure was made necessary since data covering the tobacco trade of bloc countries are not available to the Tobacco Division, FAS. For the purpose of this analysis, the substantial export trade of China to other bloc countries is considered as intra-bloc trade and has not been taken into account.

UNMANUFACTURED TOBACCO: FREE WORLD TRADE WITH SOVIET BLOC (INCLUDING COMMUNIST CHINA)

(Declared Weight)



both on an economic and political basis. This is true particularly in those countries that have little industrial development. It also insures a market for bloc industrial products.

Prices paid by state purchasing agencies of the bloc countries for leaf tobacco in some of the free world producing areas have been apparently higher than prices offered by other free world markets. These prices for tobacco, however, are actually relatively low, since the prices that bloc countries receive for manufactured goods in such trade greatly exceed those quoted for similar articles in the free world. Some of the bloc countries are sending technicians into underdeveloped areas to increase production and improve the quality of the agricultural products which those areas export.

Free world tobacco exports to the Soviet bloc countries during 1955, amounting to about 82 million pounds, were about 11 percent below the 1935-39 annual average. On the other hand, free world imports of

Soviet bloc leaf during 1955 totaled only 16 million pounds, compared with the pre-war annual average of 77 million pounds.

TABLE 1.—UNMANUFACTURED TOBACCO: Free world trade with the Soviet bloc¹

	Exports			Imports		
	Total Free World	To Bloc	Percent to Bloc	Total Free World	From Bloc	Percent from Bloc
	Million pounds	Million pounds	Percent	Million pounds	Million pounds	Percent
1935-39 Av.....	1,036	92	8.9	975	77	7.9
1947-51 Av.....	1,137	62	5.5	987	18	1.8
1950.....	1,189	27	2.3	1,059	17	1.6
1951.....	1,290	56	4.3	1,145	21	1.8
1952.....	1,166	39	3.3	1,047	12	1.1
1953.....	1,302	34	2.6	1,140	9	.8
1954.....	1,290	77	6.0	1,179	9	.8
1955 ²	1,389	82	5.9	1,245	16	1.3

¹ The bloc includes the following countries: Albania, Bulgaria, Czechoslovakia, East Germany, Hungary, Poland, Rumania, Soviet Union and Communist China.

² Preliminary.

United States trade with Soviet bloc

In prewar years (1935-39), the United States was by far the largest supplier of tobacco to the countries now included in the Soviet bloc and accounted for well over one-half of total bloc imports from the

free world. During the period 1935-39, most of the United States exports to countries now in the bloc moved to China. United States exports to that country during this period averaged 49 million pounds, and consisted almost entirely of flue-cured and tobacco stems, trimmings and scrap. However, since the Communist domination of mainland China, United States exports of leaf to that country have been virtually nil. In recent years, with the exception of small quantities of fire-cured and cigar leaf exported to Czechoslovakia, United States export trade with the bloc countries has consisted of cigar binder and wrapper tobacco consigned to East Germany. Total United States exports of tobacco to the bloc countries averaged less than 250,000 pounds during 1954 and 1955.

United States imports of tobacco (cigarette leaf) from bloc countries averaged 1.5 million pounds annually during 1935-39, chiefly from the Soviet Union and Bulgaria. Postwar imports from the bloc reached a peak in 1951. During the latter part of that year, the United States import duty on tobacco originating in the Soviet Union and its satellites reverted to the 1930 tariff rate of 35 cents per pound. Withdrawals from bond of bloc tobacco were completed in that year, prior to the increase in tariff from the previous 15 cents per pound. Since 1951, imports of cigarette leaf into the United States from the bloc countries have been insignificant.

Free world sources of bloc imports

Principal sources for the Soviet bloc in Eastern Europe of unmanufactured tobacco from the free world, include Turkey, Greece, Yugoslavia, Italy, Iran and the Netherlands (re-exports). Communist China's principal source is India, with some leaf moving as re-exports from Hong Kong. During 1955, bloc imports from Turkey, Yugoslavia and India increased substantially, while takings from Greece and Italy were sharply reduced.

Turkey's shipments of tobacco to Soviet bloc countries now account for more than one-third of the total free world exports to those countries. The Turkish foreign exchange position has deteriorated, and has been accompanied by rapidly rising inflation. Prices which hard currency countries must pay for Turkish leaf have risen substantially due to this inflation and the controlled exchange rates. Because of this

situation, it will continue to be difficult to export Turkish tobacco and other products to the "hard currency" areas unless the Turkish currency is devalued, the use of producers' premiums is increased, or the use of bilateral trade agreements is expanded. Turkey's exports to bloc countries rose from 8 million pounds in 1953 to about 34 million in 1955.

India's exports of tobacco and other agricultural commodities to the bloc countries in exchange for both industrial and consumer goods are increasing. Bilateral arrangements existing at the end of 1955 between India on the one hand, and such countries as Czechoslovakia, East Germany, Hungary, Poland, the Soviet Union and China on the other, provide for the exportation of Indian tobacco and other agricultural products. In January 1956, the Indian Government formed a new Export Promotion Council for tobacco. The purpose of this organization is to explore new markets for Indian tobacco, particularly among Eastern European countries. This council is also aggressively pushing tobacco sales to the Soviet Union to finance much-needed imports of steel. India's tobacco exports to Communist China during calendar 1955 amounted to 20.9 million pounds in contrast to 10 million pounds during the previous fiscal year (April 1954-March 1955). In previous postwar years India also shipped considerable quantities of tobacco to the Soviet Union.

Yugoslav tobacco exports behind the Iron Curtain were important during the 1946-49 period, but no shipments were reported for 1950-1953. Exports, however, rose to about 900,000 pounds in 1954 and increased sharply

TABLE 2.—Free World: Exports of unmanufactured tobacco to Soviet bloc (including Communist China)

Country of Purchase	1935-39 Average	1947-51 Average	1950	1951	1952	1953	1954 ¹	1955 ²
United States.....	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds
Yugoslavia.....	51,429	16,543	349	38	479	2,444	263	216
Turkey.....	5,091	10,396	6,129	7,480	15,445	7,962	24,772	33,910
Greece.....	6,870	1,500	--	--	10,585	13,672	17,768	8,377
India ³	4,757	5,764	8,486	10,950	4,010	1,562	10,068	20,921
Italy.....	3,449	2,293	6,744	3,527	153	6,081	15,247	4,564
Netherlands.....	948	782	291	541	329	547	1,409	2,032
Iran.....	44	9,500	--	11,027	3,027	--	1,073	N.A.
Yugoslavia.....	9,074	9,590	--	--	--	--	903	10,500
Algeria.....	--	272	--	1,358	3,018	1,105	2,463	N.A.
Japan.....	6,420	--	--	--	--	--	44	N.A.
Hong Kong.....	3,208	2,538	4,532	20,917	1,132	1,646	1,752	855
Others.....	505	1,383	--	368	514	374	831	1,800
Total.....	91,995	61,861	26,531	56,206	38,672	34,393	76,593	82,375

¹ Preliminary.

² Year beginning April 1, except for 1955, which is calendar year.

³ Re-exports plus shipments from bonded warehouses.

⁴ Partially estimated.

⁵ Re-exports.

TABLE 3.—SOVIET BLOC: Imports of unmanufactured tobacco from the free world¹

Importing Country	1935-39 Average	1947-51 Average	1950	1951	1952	1953	1954 ²	1955 ²
	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds
Soviet Union.....	3,629	24,806	10,469	25,811	12,503	10,961	24,076	9,108
Communist China.....	64,016	18,430	4,944	24,235	1,533	3,237	11,874	21,776
Hungary.....	1,646	651	—	467	8,753	8,303	10,481	8,365
Poland.....	9,415	3,021	6,106	44	585	478	5,522	17,782
Czechoslovakia.....	11,020	9,489	4,756	4,729	1,103	3,496	4,823	8,122
East Germany.....	—	3,878	246	492	16,195	7,918	19,819	16,958
Others.....	2,269	1,586	—	428	—	—	—	264
Total.....	91,995	61,861	26,531	56,206	38,672	34,393	76,593	82,375

¹ Based on free world exports to the bloc countries.² Preliminary.

TABLE 4.—FREE WORLD: Sources of unmanufactured tobacco in the Soviet Bloc countries

Country of Origin	1935-39 Average	1947-51 Average	1950	1951	1952	1953	1954 ¹	1955 ¹
	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds
Soviet Union.....	3,162	4,384	5,734	9,720	1,921	3,799	3,343	2,957
Communist China.....	14,295	1,505	2,819	1,527	4,295	2,283	2,112	2,020
Bulgaria.....	43,167	9,756	3,606	6,095	2,380	1,842	3,385	10,620
Hungary.....	15,490	2,709	5,103	3,915	3,135	878	145	303
Czechoslovakia.....	—	—	9	152	444	—	—	—
Others.....	982	33	15	8	—	—	—	232
Total.....	77,096	18,420	17,286	21,417	12,175	8,802	9,185	16,132

¹ Preliminary.

TABLE 5.—FREE WORLD: Imports of unmanufactured tobacco from the Soviet-bloc countries

Importing Country	1935-39 Average	1947-51 Average	1950	1951	1952	1953	1954 ¹	1955 ¹
	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds
West Germany.....	31,927	1,674	1,977	923	542	321	755	2,798
Netherlands.....	4,452	1,338	1,596	348	489	308	485	997
Norway.....	393	101	110	46	81	66	—	—
Denmark.....	764	375	56	333	—	55	(³)	—
France.....	6,325	1,034	1,253	889	1,767	7	—	4 2
Belgium.....	2,380	705	483	2,087	978	1,097	732	861
Austria.....	7,460	1,285	662	1,518	4	662	1,102	1,591
Italy.....	3,052	1,264	848	882	—	2,181	2,068	5,791
Switzerland.....	685	368	335	234	154	156	163	167
Sweden.....	385	97	—	112	—	112	168	110
Finland.....	2,684	895	1,059	969	829	652	800	4 900
Portugal.....	560	243	163	441	—	—	—	—
Egypt.....	3,202	2,199	2,174	2,379	5,670	1,795	2,107	4 2,340
Hong Kong.....	5,932	565	1,391	207	419	1,081	772	595
Japan.....	1,353	—	—	—	—	—	—	N.A.
Algeria.....	885	397	581	761	791	168	—	N.A.
Tunisia.....	306	165	331	162	444	—	—	N.A.
Yugoslavia.....	—	1,176	—	—	—	—	—	N.A.
United States.....	1,535	4,358	3,737	9,124	7	(³)	33	—
Others.....	2,816	181	530	2	—	181	—	N.A.
Total.....	77,096	18,420	17,286	21,417	12,175	8,802	9,185	16,132

¹ Preliminary.² Gross imports: direct, withdrawals from bond, and arrivals in bonded warehouses.³ Less than 500 pounds.⁴ Partially estimated.

to about 10.5 million pounds during 1955. Principal destinations for Yugoslav leaf last year included the Soviet Union, Poland, East Germany and Czechoslovakia.

In contrast to these increased exports to the bloc, shipments from Greece, Iran and Hong Kong have declined. In 1955, for example, Greek exports to the Soviet bloc were less than one-half as large as those in 1954--about 8 million pounds compared with 18 million pounds. The devaluation of the Greek drachma in 1953 and further stabilization of the currency has resulted in larger exports from that country to the free world, particularly the United States, West Germany and France. This development has reduced supplies available for disposal behind the Iron Curtain.

The Soviet Union takes roughly about one-third of total free world tobacco exports to the bloc. Principal sources of Soviet Union imports include Italy, Greece, Yugoslavia and Iran. East Germany is becoming an increasingly important market. Imports of free world leaf into that area consist largely of Oriental tobaccos from Turkey, Greece and Yugoslavia, cigar leaf from the United States and shipments of

various types from Netherlands bonded warehouses. Since 1952, Poland and Czechoslovakia have increased their takings of free world tobacco, and it is highly probable that the demand for imported leaf in these countries will continue to rise. (See table 3.)

Free world imports of bloc leaf

Imports of leaf tobacco into the free world from behind the Iron Curtain appear to be increasing after declining from the postwar high reached in 1951 (See table 5.) Most of the increase can be accounted for by a number of trade arrangements with the bloc countries which include leaf tobacco in exchange for industrial and consumer goods. Most of the leaf is of Bulgarian, Chinese and Soviet Union origin.

Communist China's principal outlets for tobacco in the free world include Egypt, Hong Kong, West Germany, Belgium and the Netherlands. Bulgaria's chief export outlets include Belgium, Italy, Switzerland, Finland, Norway, West Germany and the Netherlands. Principal markets in the free world for Soviet Union tobacco include Italy, Finland, Sweden and Egypt. (See table 4.)



Russian Oriental Tobacco Sheds



Russian Oriental Tobacco Suncuring



Russian Cigarettes



Large Russian Tobacco

The Soviet Union is one of the world's largest tobacco producing countries, but is a net importer of leaf. Consumption is mostly in the form of cigarettes.

U. S. COMPETITIVE POSITION



Garvey Market

HOW THE UNITED STATES FARED IN WORLD TRADE

Improvement in 1955

United States unmanufactured tobacco exports during the calendar year 1955 totaled 539 million pounds, the largest since 1946. Value of exports at \$355 million, set an all-time record. The United States' share in free world export trade in tobacco last year was 39 percent as compared with 35 percent in 1954. Exports of tobacco products from the United States in 1955 were valued at \$63 million, compared with an average of only \$10 million during 1934-38.

Factors stimulating United States export trade in tobacco last year included: (1) high levels of economic activity abroad; (2) improved gold and dollar reserves in a number of foreign markets, (3) export programs under Public Law 480; (4) increasing world consumption of cigarettes made from light tobaccos; (5) relatively low stocks abroad in relation to consumption, and (6) increased United States imports of foreign goods providing overseas markets with more dollar exchange. Markets taking more United States leaf tobacco last year included the United States, West Germany, Belgium-Luxembourg, Denmark, Australia, Japan, Egypt and Thailand. Shipments to Japan included a significant quantity of Burley tobacco for the first time in history.

United States exports last year were favorable in spite of larger supplies of tobacco available for export in competing countries. Trade barriers also continued to limit exports from this country. These included preferential tariffs, guaranteed purchase agreements, bilateral trading arrangements and state trading. Prices for some grades and kinds of United States leaf also had a restrictive effect on exports.

Prospects for 1956

Exports during 1956 are expected to be somewhat lower than those for last year. Supplies of foreign competitive tobaccos from the crops of 1955 and early 1956 will

be larger than ever. Increased prices for some lower grades of United States leaf will have an adverse effect on demand from certain markets where price is the primary consideration. Special problem markets, such as the Philippine Republic, will take considerably less tobacco this year. Stock rebuilding which occurred in 1955 will tend to reduce exports to some countries. The growing network of bilateral trading arrangements, such as those for Greece and Turkey on the one hand, and importing countries on the other, will also tend to have an unfavorable influence on United States exports. (An increase in the United Kingdom import duty on unmanufactured tobacco was announced in April, raising the rate on all categories of tobacco by 3 shillings (United States \$.42) per pound. This action increases the tariff on the principal category of leaf imported from the United States from the equivalent of United States \$8.14 to \$8.56 per pound. Cigarette prices were increased about 2½ cents a package. This increase in retail prices may curtail consumption and reduce demand for imported tobacco.)

U. S. PROGRAMS TO EXPAND EXPORTS

The Department of Agriculture was given responsibility for administering Title I of P.L. 480 on September 9, 1954. Under provisions of this law, it is possible for friendly foreign countries to purchase with local currencies tobacco and certain other agricultural commodities.

Almost 100 million pounds of tobacco valued at about 67 million dollars have been included in Title I programs, for which agreements had been signed as of March 30, 1956. About 54 million pounds were provided for in agreements signed during fiscal year 1955, and the remainder has been provided for in agreements signed during the first three quarters of fiscal

Left to right: J. B. Hutson, President of Tobacco Associates; Gwynn Garnett, Administrator of FAS; Randolph Taylor, Executive-Secretary of the Burley and Dark Leaf Tobacco Export Association; and J. Con Lanier, Executive-Secretary of the Leaf Tobacco Exporters Association, signing a market development program agreement for tobacco.



Left to right: John W. Koon, Executive-Secretary of the Kentucky Farm Bureau; Robert A. Owen, Director of the Tobacco Division, FAS; Ben J. Butler, Commissioner of Agriculture of Kentucky; and Ernest L. Harris, a Director of the Kentucky Farm Bureau, discussing tobacco export problems during a recent conference in Washington.



A scene from the tobacco exhibit at the Osaka Trade Fair in Japan. Included in the exhibit were cigarette manufacturing and packaging machines and a booth from which cigarettes were handed out.



U.S. DEPARTMENT OF AGRICULTURE

Free World: Summary of unmanufactured tobacco exports from principal countries; averages 1935-39 and 1945-49; annual 1954 and 1955

Exporting country	Average				1954 ¹	Percent of total	1955 ¹	Percent of total
	1935-39	Percent of total	1945-49	Percent of total				
	Million pounds	Percent	Million pounds	Percent	Million pounds	Percent	Million pounds	Percent
United States.....	421	40.7	514	48.3	454	35.2	539	38.8
Central African Federation ²	33	3.2	77	7.2	132	10.2	124	8.9
India ³	44	4.2	62	5.8	74	5.7	87	6.3
Canada.....	16	1.5	17	1.6	32	2.5	48	3.5
Greece.....	98	9.5	40	3.8	116	9.0	121	8.7
Turkey.....	75	7.2	105	9.9	142	11.0	132	9.5
All others.....	349	33.7	249	23.4	340	26.4	338	24.3
Total Free World	1,036	100.0	1,064	100.0	1,290	100.0	1,389	100.0

See footnotes at end of tables.

Free World: Exports of flue-cured tobacco; averages 1935-39 and 1947-51; annual 1954 and 1955

Exporting country	Average				1954 ¹	Percent of total	1955 ¹	Percent of total
	1935-39	Percent of total	1947-51	Percent of total				
	Million pounds	Percent	Million pounds	Percent	Million pounds	Percent	Million pounds	Percent
United States.....	313	84.8	388	75.9	375	63.7	454	65.5
Central African Federation ²	22	6.0	72	13.7	109	18.5	107	15.5
India ³	15	4.1	40	7.6	60	10.2	70	10.1
Canada.....	12	3.3	20	3.8	31	5.3	46	6.6
All others.....	7	1.8	5	1.0	14	2.3	16	2.3
Total Free World.....	369	100.0	525	100.0	589	100.0	693	100.0

¹ Preliminary.² The Rhodesias and Nyasaland.³ Years beginning April 1, except for 1955, which is calendar year.

year 1956. The following table indicates agreements signed under Title I of P.L. 480 providing for the sale of tobacco as of March 30, 1956:

Country	Date Signed	Estimated	
		Million pounds	Million pounds
Fiscal Year 1955 Programs:			
Pakistan.....	Jan. 18, 1955.....	3.60	3.00
United Kingdom.....	June 7, 1955.....	22.00	15.00
Japan.....	May 31, 1955.....	6.20	5.12
Spain ¹	April 20, 1955.....	4.60	2.30
Finland.....	May 6, 1955.....	3.80	2.20
Thailand.....	June 21, 1955.....	2.60	2.00
Italy.....	May 23, 1955.....	4.20	3.20
Austria.....	June 14, 1955.....	.90	.50
Korea ²	May 31, 1955.....	6.00	4.42
Israel ²	April 29, 1955.....	.25	.20
Total.....		54.15	38.14
Fiscal Year 1956 Programs:			
France.....	Aug. 11, 1955.....	.87	.65
Brazil.....	Nov. 16, 1955.....	.10	.25
Ecuador.....	Oct. 7, 1955.....	.32	.20
Israel.....	Nov. 10, 1955.....	.25	.20
Chile.....	March 13, 1956.....	.30	.25
Korea.....	March 13, 1956.....	3.00	2.00
Austria.....	Feb. 7, 1956.....	5.00	3.00
Burma.....	Feb. 8, 1956.....	1.50	1.10
Spain.....	March 5, 1956.....	4.00	2.00
Indonesia ³	March 5, 1956.....	23.00	15.00
Finland.....	March 26, 1956.....	6.30	3.80
Total.....		44.64	28.45
Grand Total.....		98.79	66.59

¹ The original Spanish agreement included 9.0 million pounds of tobacco at 4.5 million dollars but this was amended.

² The original poundage estimate for Korea was 10 million but this was revised when the Koreans indicated need for more expensive leaf for blending.

³ A 2-year program covering fiscal years 1956 and 1957.

It is estimated that shipments of tobacco under the program have exceeded 50 million pounds to date. The remainder of the tobacco for which agreements were signed as of March 30, 1956 and which has not yet been shipped is shown in the following table:

Country	Value	Purchase Authorizations		
		Number	Ending Contracting Period	Ending Shipping Period
Fiscal Year 1955 Programs:				
Pakistan.....	.12	15-01	Dec. 31, 1955	Sept. 30, 1956
	.29	15-13	May 31, 1956	Sept. 30, 1956
	1.72	15-14	Dec. 31, 1955	Sept. 30, 1956
Spain.....	1.22	17-04	Nov. 30, 1955	June 30, 1956
	1.11	17-05	Mar. 31, 1956	June 30, 1956
Italy.....	.43	20-01	May 31, 1956	June 30, 1956
Fiscal Year 1956 Programs:				
Brazil.....	.25	(1)		
Ecuador.....	.20	29-03	May 15, 1956	June 15, 1956
Israel.....	.20	16-18	May 31, 1956	June 30, 1956
Chile.....	.30	(1)		
Korea.....	.30	(1)		
Burma.....	3.0	21-07	June 30, 1956	July 31, 1956
Spain.....	.77	(1)		
Indonesia.....	7.7	34-03	June 30, 1956	Sept. 30, 1956
Finland.....	3.8	18-05	Nov. 30, 1956	Dec. 31, 1956

¹ These purchase authorizations are expected to be issued in the near future.

During the summer of 1955, Congress amended P.L. 480 to change the authorized amount under Title I from \$700 to \$1,500 million. During the period July 1, 1955 through March 30, 1956, agreements were signed providing for the sale of 28.45 million dollars worth of U. S. tobacco. It is expected that more tobacco will be contracted for under the program during the remainder of fiscal year 1956. Exports under P.L. 480 during fiscal year 1957 will depend to a great extent upon whether or not Congress increases the funds available for this program prior to its termination date on June 30, 1957.

Examples of significant developments under P.L. 480 to date are as follows: (1) The agreements with Korea and Burma represent new postwar markets for U. S. tobacco; (2) arrangements have been made to ship cut tobacco in bulk which will enable us to expand consumption of our tobacco in countries such as Ecuador; (3) a special credit arrangement with the United Kingdom, which permitted purchase of tobacco during the season and shipment later helped stabilize the auction markets during sale of the 1954 crop; (4) total exports of U. S. tobacco in calendar 1955 exceeded the previous year by about 19% largely due to sales under P.L. 480; and (5) sales have enabled several countries to increase their stock level of United States tobacco and to introduce new brands of American-type cigarettes.

Market Development (Section 104(a)) Projects

Section 104(a) of P.L. 480 authorizes, among other purposes, the use of foreign currencies "to help develop new markets for U. S. agricultural commodities on a mutually benefiting basis." In this connection a contract has been signed between FAS and the United States tobacco trade which provides for the United States trade to contribute certain dollar costs and the FAS to furnish substantial amounts of local currency for tobacco market development projects during the next two years.

In most of the countries which have purchased tobacco under the program, plans are being made to develop projects which will help increase the consumption of United States tobacco in these countries. These projects will be financed by use of local currencies accruing from P.L. 480 sales

together with contributions from the United States and foreign tobacco trade groups. To help develop new markets for United States tobacco, some of the following projects will be undertaken:

(a) Help advertise and expand the consumption of tobacco products which use a high percentage of U. S. leaf.

(b) Pay expenses of foreign tobacco officials for travel to the United States to learn more about processing, manufacturing and distribution.

(c) Help build pilot plants for improvement of storage or processing of United States tobacco.

(d) Participation in trade fairs.

(e) Pay for research studies such as a market analysis survey, a consumer preference study and a study of the effect of taxation and retail price of tobacco products on consumption and government revenue.

Three tobacco market development projects are already under way: (1) Several officials of the Thailand Tobacco Monopoly are visiting the United States for the purpose of learning more about tobacco handling, storage, processing and distribution; (2) a market analysis survey is being conducted in Spain by two agricultural economists from the University of Kentucky; and (3) a tobacco exhibit was arranged for the recent International Trade Fair at Osaka, Japan.

Trade Fairs

The accompanying picture shows portions of the tobacco exhibit at the Osaka Fair. This exhibit is one of the market promotion projects that has been made possible by the use of Japanese yen accruing to the United States account under the program. It was the result of a joint effort by the Foreign Agricultural Service, the United States tobacco trade and the Japanese Monopoly.

This tobacco exhibit consisted of a number of panels showing the production, marketing and processing of tobacco. Also included in the exhibit area was a cigarette manufacturing machine and a cigarette packaging machine as well as a booth from which

there was a hand-out of Japanese cigarettes containing United States leaf.

This exhibit was very popular at the Osaka Fair and attracted 8 to 10 thousand visitors per day. All visitors took the cigarettes which were given away and were fascinated with the operation of the cigarette machinery.

This is the second trade fair at which there has been a U. S. tobacco exhibit. The first tobacco exhibit was at the Cologne Food Fair in Cologne, Germany in October, 1955. Plans are being completed to provide for a tobacco exhibit in June, 1956 at the Barcelona Fair in Spain and at the Rome Fair in Italy.

As a follow-up to the tobacco exhibit at the Osaka Fair, an extensive promotional project is planned in Japan for the purpose of advertising tobacco products containing United States tobacco. An official of the United States tobacco trade is now in Japan for the purpose of getting this promotional project under way.

During the past few months the International Cooperation Administration has authorized the purchase of fire-cured tobacco as a part of "triangular" transactions under Section 402 of P.L. 665. On January 10, 1956 the agency issued an authorization providing for the purchase of \$1,650,000 worth of fire-cured tobacco by France. France in turn shipped certain consumer and industrial goods to Vietnam valued at the same amount as the above-mentioned tobacco. The Tobacco Division was instrumental in bringing about this purchase; it had been discussed with French Tobacco Monopoly officials as a possible P.L. 480 purchase but the Finance Ministry preferred to purchase the tobacco under Section 402.

On April 18, ICA issued an authorization for Italy covering purchases of \$650,000 worth of fire-cured tobacco as part of a "triangular" transaction action under Section 402. This program will help Italy export some manufactured goods to a third country and will enable them to comply with their usual marketing requirement provision of their P.L. 480 tobacco purchase.

U. S. LEAF STOCKS



Sampling Leaf Hogsheds

UNITED STATES TOBACCO STOCKS-- JANUARY 1, 1956

Leaf tobacco inventories in the United States and Puerto Rico, including tobacco owned by both dealers and manufacturers and leaf tobacco under Government loan, totaled a record high of 5,176 million pounds (farm-sales-weight) as of January 1, 1956. This was 402 million pounds or 8 percent higher than total stocks reported the previous January 1. Larger stocks of flue-cured, Burley and Maryland accounted for most of the increase.

Stocks of flue-cured tobacco totaled 2,816 million pounds as of January 1, 1956 compared with 2,553 million a year earlier. This represents about a 10 percent increase. Flue-cured leaf tobacco stocks under Government loans on January 1, 1956 included in the above total were 600 million pounds compared with 347 million pounds a year earlier.

Total Burley stocks were 1,566 million pounds as of January 1, 1956--an increase of 129 million over a year ago. Burley leaf tobacco under Government loans was 458 million pounds (324 million pounds a year earlier).

Total dark tobacco stocks as of January 1, 1956 were slightly more than a year earlier. Fire-cured tobacco stocks totaled 125.4 million pounds--1.1 million more than the January 1 figure a year ago. Holdings of fire-cured leaf under Government loan of 46.2 million pounds remained at about the level of the previous year.

Dark air-cured stocks totaled 85.2 million pounds as of January 1, 1956, as compared with 83.5 million a year earlier. Stocks under Government loan of 37.3 million pounds represented a slight decline.

Total Maryland stocks as of January 1, 1956 were 77.2 million pounds--an increase of 8.6 million over the figure reported a year earlier.

Total stocks of all domestic cigar leaf types as of January 1, 1956, including Puerto Rican, were 307.1 million pounds, which was 5.1 million pounds above the level a year earlier. Stocks of foreign grown cigar leaf were 18.5 million pounds (unstemmed equivalent)--about 1.2

million more than was reported last January 1.

Foreign-grown cigarette and smoking tobacco stocks (Turkish and other) were reported to be 175.3 million pounds, which was 10.5 million pounds below the record level of January 1 last year. These figures are on unstemmed equivalent basis. (The accompanying chart and table were used by courtesy of the Fiscal Division, Commodity Stabilization Service, USDA.)

Tobacco: CCC holdings under loans and in inventories in comparison with total stocks, 1946-55

(Green weight)

(Millions of pounds)

Year	CCC holdings	Held by trade	Total stock ¹
DARK (As of October 1)			
1946.....	.2	165.3	165.5
1947.....	53.7	162.4	216.1
1948.....	84.2	155.6	239.8
1949.....	95.7	135.6	231.3
1950.....	101.0	143.5	244.5
1951.....	75.7	143.3	219.0
1952.....	80.5	139.6	220.1
1953.....	92.0	132.0	224.0
1954.....	84.7	125.1	209.8
1955.....	84.8	133.3	218.1

BURLEY (As of October 1)			
1946.....	16.0	837.3	853.3
1947.....	151.0	789.8	940.8
1948.....	96.0	806.3	902.3
1949.....	132.0	842.3	974.3
1950.....	111.0	889.2	1,000.2
1951.....	69.0	912.3	981.3
1952.....	122.9	938.3	1,061.2
1953.....	197.5	965.9	1,163.4
1954.....	228.0	970.1	1,198.1
1955.....	431.0	916.8	1,347.8

FLUE-CURED (As of July 1)			
1946.....	10.0	1,137.4	1,147.4
1947.....	62.0	1,224.8	1,286.8
1948.....	107.0	1,443.2	1,550.2
1949.....	127.0	1,411.2	1,538.2
1950.....	86.0	1,398.5	1,484.5
1951.....	85.0	1,472.5	1,557.5
1952.....	181.0	1,549.8	1,730.8
1953.....	238.0	1,613.9	1,851.9
1954.....	279.0	1,636.1	1,915.1
1955.....	330.0	1,726.6	2,056.6

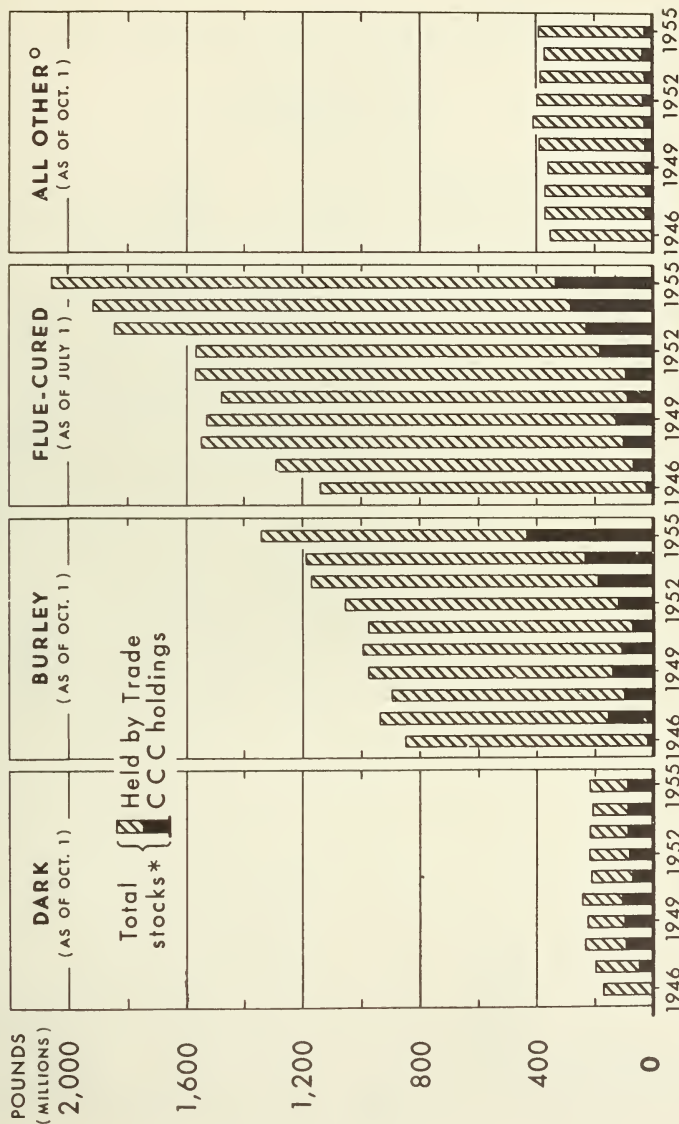
ALL OTHER ² (As of October 1)			
1946.....	—	351.0	351.0
1947.....	0.9	371.6	372.5
1948.....	15.6	377.9	393.5
1949.....	15.8	346.6	362.4
1950.....	18.5	371.3	389.8
1951.....	23.4	383.6	410.0
1952.....	26.9	383.2	410.1
1953.....	19.4	369.4	388.8
1954.....	24.7	350.2	374.9
1955.....	23.1	372.7	395.8

¹Dealers, Manufacturers and CCC holdings.

²Shade grown wrapper and Perique not included.

TOBACCO

CCC HOLDINGS UNDER LOAN AND IN INVENTORY COMPARED WITH TOTAL STOCKS, 1946 TO DATE (GREEN WEIGHT)



*DEALERS, MANUFACTURERS AND C C C HOLDINGS

O SHADE WRAPPER AND PERIQUE NOT INCLUDED

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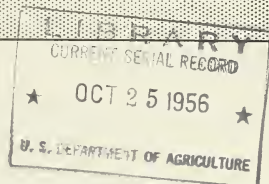
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FOREIGN AGRICULTURE CIRCULAR

UNITED STATES DEPARTMENT OF AGRICULTURE
FOREIGN AGRICULTURAL SERVICE
WASHINGTON, D. C.



FT 9-56

August 24, 1956

SALE OF TOBACCO AND TOBACCO MARKET DEVELOPMENT PROJECTS UNDER PUBLIC LAW 480 AS OF JUNE 30, 1956

This circular gives a summary of the programs for the sale of tobacco under Title I of Public Law 480 for the period ending June 30, 1956. As of the end of fiscal year 1956, 23 agreements had been signed with 16 countries providing for the sale of \$83.8 million worth of U. S. tobacco (about 118.5 million pounds). Agreements providing for the sale of about 54 million pounds were signed in fiscal 1955 compared with about 64 million pounds in fiscal 1956. The market value and estimated weight of the tobacco included in all agreements signed as of June 30, 1956 are shown in Table I.

Table I. Agreements Signed Under Title I of
Public Law 480 Providing for the Sale of
U. S. Tobacco as of June 30, 1956

Country	Estimated Quantity	Value
	Million Pounds	Million Dollars
Austria	5.90	3.50
Brazil	.10	.25
Burma	1.50	1.10
Chile	.30	.25
Ecuador	.32	.20
Finland	10.10	6.00
France	.87	.65
Indonesia	23.00	15.00
Israel	.50	.40
Italy	4.20	3.20
Japan	7.90	10.30
Korea	9.00	6.62
Pakistan	3.60	3.00
Spain	8.60	4.30
Thailand	2.60	2.00
United Kingdom	40.00	27.00
Total	118.49	83.77

On August 3, 1956, Public Law 962 was signed by the President, increasing the maximum amount authorized under Title I of Public Law 480 from \$1.5 billion to \$3.0 billion. It is expected that a number of agreements will be signed in fiscal year 1957 for the sale of tobacco under this program. At present agreements have been signed providing for the sale of tobacco in fiscal 1957 to: Italy, about 2.9 million pounds; Formosa, about 2.1 million pounds; and Pakistan, about 1.9 million pounds.

The remainder of the tobacco for which agreements were signed as of June 30, 1956 and which has not yet been shipped is shown in the following table:

Table II. Tobacco, for Which Agreements Were Signed as of June 30, 1956, and Which Has Not Yet Been Shipped:

Country	Value		Purchase Authorizations	
	: Million :		: End of Contracting :	: End of Shipping
	: Dollars :	: Number :	: Period :	: Period :
Austria	: 3.00	: 21-07	: June 30, 1956	: Sept. 30, 1956
Brazil	: .25	: 28-05	: Aug. 31, 1956	: Oct. 1, 1956
Burma	: 1.10	: 33-02	: Aug. 31, 1956	: Sept. 30, 1956
Chile	: .25	: 12-08	: Aug. 31, 1956	: Feb. 28, 1957
Ecuador	: .04	: 29-03	: June 30, 1956	: Oct. 1, 1956
Finland	: 3.79	: 18-05	: Nov. 30, 1956	: Dec. 31, 1956
Indonesia	: 15.00 ^{1/}	: 34-03	: Oct. 1, 1956	: Dec. 31, 1956
Japan	: 2.76	: 22-10	: Aug. 31, 1956	: Oct. 1, 1956
Korea	: 2.02	:	:	:
Pakistan	: .98	: 15-15	: May 31, 1956	: Sept. 30, 1956
Spain	: 2.00	: 17-15	: Aug. 31, 1956	: Oct. 1, 1956

^{1/} One-half of this is to be shipped not later than December 31, 1956 and the balance not later than June 30, 1957.

The percentage of each type of tobacco shipped under the program as of June 30, 1956, compared with total shipments during previous selected periods, was as follows:

Table III. Percentages of Tobacco by Type Exported Under P.L. 480, With Comparisons

	: Flue- : cured :	Burley	: Dark-Fired : Ky.-Tenn. :	: Dark-Fired : Va. :	: All : Cigar :	: All : Other :
1935-39 Average	: 74.4	: 2.5	: 11.6	: 2.2	: .3	: 9.0
1947-51 Average	: 79.8	: 6.7	: 5.1	: 1.2	: 2.0	: 5.2
1954-55 Average	: 83.6	: 6.1	: 4.3	: .0	: 1.1	: 4.1
P.L. 480 as of	: :	: :	: :	: :	: :	: :
June 30, 1956	: 85.1	: 8.4	: 5.5	: .3	: .4	: .3

Shipments of tobacco under fiscal year 1955 and 1956 programs, as of June 30, 1956, have totaled about 75 million pounds. About 4 million pounds of this total was shipped prior to June 30, 1955 and the remaining 71 million pounds was shipped during fiscal year 1956. Table IV indicates United States exports of unmanufactured tobacco under P.L. 480, by types and country of destination, fiscal year 1955 and fiscal year 1956 programs, as of June 30, 1956.

Purchases under P.L. 480 must be in addition to usual purchases for dollars, which means that tobacco sold under the program must be used to increase the stock level or be used for increased consumption. In this respect the program for tobacco has been very successful to date. For example, in calendar 1955 exports exceeded the calendar 1954 level by about 84 million pounds. About one-half of this increase was due to sales under P.L. 480 and the other 42 million pound increase was due to an increase in "dollar" sales. In fiscal 1956, "dollar" sales exceeded total exports in fiscal 1955 by about 44 million pounds. In addition, about 71 million pounds of tobacco were shipped under provisions of P.L. 480 during the year ending June 30, 1956.

In most of the countries which have purchased tobacco under P.L. 480 plans are under way to develop projects which will help increase the consumption of U. S. tobacco in these countries. These projects are being undertaken in cooperation with the U. S. and foreign tobacco trade associations. Projects now under way or being planned include sales promotional programs, visits of foreign tobacco officials to the U. S. to learn more about tobacco products and marketing methods, exhibits at foreign trade fairs, training activities and market research and analysis.

Four U. S. tobacco exhibits have been undertaken at international fairs during the past year: (1) The International Food Fair at Cologne, Germany, last October; (2) Osaka International Trade Fair, Osaka, Japan in April 1956; (3) Barcelona Trade Fair, Barcelona, Spain, June 1956; and (4) U. S. Super-market Trade Exhibit in Rome, Italy, June 1956.

Other tobacco market development projects under way include the following: (1) an extensive promotional project has been launched in Japan for the purpose of expanding sales of Japanese brands of cigarettes containing U. S. leaf; (2) several officials from the Thailand Tobacco Monopoly have been visiting the U. S. for the purpose of learning more about processing and distribution of tobacco and tobacco products; and (3) two agricultural economists from the University of Kentucky have completed three months of field work in Spain on a tobacco market analysis study.

During the next six months it is expected that about six additional market development projects will be undertaken in countries where local currencies are available to help finance these projects. Such projects can play an important role in helping expand the market for U. S. tobacco in foreign countries.

Table IV. United States Exports of Unmanufactured Tobacco Under P.L. 480, by Types and Country Destination, Fiscal Year 1955 and Fiscal Year 1956, as of June 30, 1956 1/

(Declared Weight)

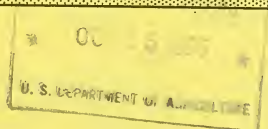
Country	Flue-Cured		Burley		Dark-Fired Kentucky-Tennessee		Dark-Fired Virginia		Maryland		Green River		All Cigar Leaf		Total	
	Pounds	Dollars	Pounds	Dollars	Pounds	Dollars	Pounds	Dollars	Pounds	Dollars	Pounds	Dollars	Pounds	Dollars	Pounds	Dollars
Austria	3,114	1,810	1,678	900	73	128	162	128					191	219	5,265	3,160
Ecuador	125	105	68												193	163
Finland	2,983	1,835	705	309	105	38	70	31							3,863	2,213
France	870	650													870	650
Israel	606	376													606	376
Italy			1,150	867	3,029	2,332									4,179	3,199
Japan	4,967	3,958	1,736	1,175											6,703	5,133
Korea	6,069	4,604													6,069	4,604
Pakistan	2,119	2,023													2,119	2,023
Spain	729	573	961	653	911	258			180	66	15	4	73	121	2,899	1,675
Thailand	2,622	2,001													2,622	2,001
United Kingdom	39,112	26,999													39,112	26,999
Total	63,976	44,931	6,298	3,962	4,165	2,701	232	159	180	66	15	4	264	370	75,130	50,196

1/ Latest available information.



FOREIGN AGRICULTURE CIRCULAR

UNITED STATES DEPARTMENT OF AGRICULTURE
FOREIGN AGRICULTURAL SERVICE
WASHINGTON, D. C.



FT 10-56

August 28, 1956

ESTIMATED TOBACCO PRODUCTION IN THE NORTHERN HEMISPHERE FOR HARVEST IN THE SECOND HALF OF CALENDAR YEAR 1956

Total production of tobacco for harvest in the second half of calendar year 1956 in specified countries of the Northern Hemisphere is estimated at 5,980 million pounds, compared with 6,135 million pounds for 1955. Most of the decrease is due to smaller production in the United States, Greece and Yugoslavia. The largest increases are expected in Canada, Communist China, Italy and Korea.

PRODUCTION BY AREAS

North America

Production in North America for harvest in the last half of 1956 is forecast at 2,212 million pounds, which is a very large decrease of 153 million compared with 2,365 million pounds last year.

The largest decrease in production (153 million pounds) as compared with 1955 is forecast for the United States as a result of sharp reductions in acreages of flue-cured (11 percent) and cigar binder (26 percent).

The 1956 Canadian crop is estimated at 184 million pounds compared with an output of 135 million in 1955. The expected rise is due to an increase in acreage of flue-cured.

The estimated production of 30 million pounds for Puerto Rico is 4 million pounds below the 1955 level due to a reduction in both acreage and average yield.

Europe

Production in Western Europe in 1956 is estimated at 686 million pounds, which is 21 million below the 1955 level. Total production for all of Europe in 1956 is estimated at 1,420 million pounds, which is only slightly below that of last year. Spain continues its sharp upward trends in acreage and production. Output in Italy is expected to be about 8.7 million pounds above that of 1955, and the crop in France is estimated as slightly more than that of last year.

Iron Curtain countries, including the U.S.S.R., are expected to increase production by 15 to 20 million pounds.

Africa

Tobacco for harvest in the second half of 1956 in Africa is estimated at 48 million pounds, about equal to that of 1955.

Asia

Production in the second half of 1956 is estimated at 2,300 million pounds, which is about the same as in 1955. The most important increases are forecast for Communist China, Korea and Iran. These together with the slight rises expected in Iraq and Lebanon are more than offset by expected declines in Japan, Turkey and Syria.

PRODUCTION BY KINDS

Flue-Cured

Output of flue-cured in these specified countries is expected to total 2,248 million pounds, which is about 149 million pounds below that of 1955. Production in the United States is estimated at 1,277 million pounds or 206 million below the level of last year. This is due to a large decrease (11 percent) in acreage.

An expansion of 24,000 acres in Canadian flue-cured is expected to raise production to 170 million pounds, which is more than 50 million above that of 1955.

Flue-cured production in Communist China is expected to increase 25 million pounds over that of 1955, although no reliable forecasts are available. The Japanese crop is forecast at 185 million pounds, a reduction of 24 million pounds compared to that of 1955. This is anticipated chiefly as a result of yields estimated at almost 11 percent below the very high average in 1955.

Burley

Total Burley production in these countries in 1956 is estimated at 578.6 million pounds, about 26 million above the 1955 harvest. Output is expected to increase in all Burley-producing countries, except Germany and Switzerland. The largest rise is a result of an expansion of acreage in Spain, with most of the remaining increase accounted for by the United States, Italy and Japan. The increase of 10,000 acres in Spain is expected to raise 1956 production to 44.5 million pounds from 29.6 million in 1955, an increase of approximately 50 percent.

LEAF TOBACCO: Estimated production by kind, harvested in the second half of calendar year 1956 with comparisons -
farm sales weight 1/

Kinds	Average		1955 2/	1956 2/
	1935-39	1947-51		
	1,000	1,000	1,000	1,000
	pounds	pounds	pounds	pounds
Flue-cured	1,260,884	1,745,194	2,397,065	2,247,900
Burley	338,343	599,902	552,586	578,623
Other light air-cured	97,384	103,216	108,052	116,785
Light sun-cured	621,649	718,813	682,124	678,226
Fire-cured	147,959	122,082	91,068	91,842
Dark air-cured	1,286,957	1,280,781	1,238,843	1,232,923
Dark sun-cured	108,957	141,092	112,069	107,964
Oriental	649,184	725,846	953,016	925,269
Total	3/ 4,519,374	4/ 5,448,654	6,134,823	5,979,532

1/ Farm sales weight is about 10 percent above dry weight. Normally reported in manufacturing and export statistics.

2/ Preliminary.

3/ Includes 8,057 thousand pounds for Iraq which are not identified by kind.

4/ Includes 11,728 thousand pounds for Iraq which are not identified by kind.

Other Light Air-Cured

Maryland tobacco production in the United States is estimated at 43.8 million pounds, an increase of 8.2 million pounds as compared with the 1955 crop. The expansion in Maryland leaf in the United States together with smaller rises in "other light air-cured" types in Italy and Japan account for the increase in total "other light air-cured" leaf.

Light Sun-Cured

Light sun-cured tobacco production in 1956 is estimated at 678 million pounds which is slightly less than the 682 million in 1955. Most of the anticipated decline is expected to result from a decrease of about 5.4 million pounds (due to lower yields) in Japan. This is expected to be offset to some extent by an increase of 1.7 million pounds in Korean production.

Leaf Tobacco: Estimated acreage and production of specified North Temperate Zone countries harvested in the second half of calendar year 1956 with comparisons -- farm sales weight 1/

Continent and Country	Acreage Harvested			Production		
	Average 1935-39	1947-51	2/ 1955	Average 1935-39	1947-51	2/ 1955
	1,000	1,000	1,000	1,000	1,000	1,000
	acres	acres	acres	pounds	pounds	pounds
NORTH AMERICA:						
Canada	69	113	110	76,556	129,445	134,840
United States	1,617	1,682	1,196	1,460,084	2,082,721	2,155,718
Puerto Rico	44	35	37	23,593	26,921	34,010
Total for countries shown	1,760	1,830	1,643	1,556,003	2,239,093	2,344,568
EUROPE:						
Austria	2/	2/	1	3/	3/	1,699
Belgium	6	5	3	16,137	9,132	1,602
France	44	70	71	72,955	109,078	116,980
Western Germany 1/	23	23	27	16,942	16,942	56,320
Greece	213	213	300	129,819	113,320	222,859
Italy	17	114	123	95,511	157,900	185,000
Spain	5/ 16	28	49	5/ 17,322	34,125	156,685
Sweden	1	1	6/	69,139	59,135	84,162
Switzerland	1	3	3	1,061	859	617
Yugoslavia	39	89	109	2,276	4,689	4,109
Total Western Europe	413	574	703	450,130	546,299	706,866
Other Europe (Incl. U.S.S.R.) 1/	711	750	835	736,231	671,419	713,700
Total Europe	1,124	1,324	1,538	1,186,361	1,217,718	1,420,566
AFRICA:						
Algeria	56	75	70	38,667	44,671	41,027
French Morocco	1	1	3	704	1,278	3,760
Tunisia	1	2	4	1,268	2,205	3,306
Total for countries shown	58	78	77	40,639	48,154	48,081
ASIA:						
Iran	35	40	46	34,542	29,355	24,758
Iraq	5/ 11	14	20	8,057	5/ 12,928	11,575
Lebanon	4	8	8	2,350	5/ 5,398	5,732
Syria	14	16	18	8,250	5/ 11,570	10,276
Turkey	194	304	382	128,505	191,109	250,689
China 8/	1,311	5/ 1,152	1,755	1,338,639	5/ 1,425,000	1,630,000
Japan	92	129	186	118,680	208,092	329,799
Korea	46	5/ 44	51	57,304	5/ 59,080	61,284
Total for countries shown	1,774	2,004	2,466	1,726,327	1,943,659	2,301,533
Total excluding Eastern Europe						
	4,455	5,006	5,416	4,308,413	5,227,205	5,871,123
TOTAL FOR ALL COUNTRIES SHOWN	4,676	5,236	5,730	4,519,374	5,448,654	6,134,823

1/ Farm sales weight is about 10 percent above average dry weight which is normally reported in export trade statistics. 2/ Preliminary.
3/ Not available. 4/ Data for Western Germany only. 5/ Less than a 5-year average. 6/ Less than 500 acres. 7/ Includes estimates for
Korea, Bulgaria, Czechoslovakia, Hungary, Poland, Rumania and Soviet Union. 8/ Communist China.

Fire-Cured

Fire-cured tobacco production in 1956 is expected to be 91.8 million pounds, a slight increase over 1955. A rise of 1.5 million pounds forecast for Italy will be partially offset by a decrease in the United States.

Dark Air-Cured

Dark air-cured leaf for harvest in the second half of 1956 is estimated at 1,233 million pounds, a decrease of 5.9 million pounds from that of 1955. The largest decreases were in the United States, Canada, Puerto Rico, Yugoslavia, Turkey and Germany. In the United States, the decrease of 10.3 million pounds in cigar binder is expected to be partially offset by rises in production in cigar filler and wrapper. Output of dark air-cured is expected to rise in Italy, France and the Iron Curtain countries.

Dark Sun-Cured

Dark sun-cured tobacco production for harvest in the second half of 1956 is estimated at 108 million pounds. This is 4.1 million pounds less than in 1955, which is due chiefly to the expected decline in production in Communist China. Production is forecast at 4.2 million pounds in the United States compared with 3.3 million pounds last year.

Oriental (Turkish) and Semi-Oriental

Total output of oriental tobacco is placed at 925 million pounds, about 28 million pounds below the 1955 level. The estimated decrease in oriental production is due chiefly to a lower forecast for Greece, but slight declines are also expected in Yugoslavia and Turkey. A substantial decrease of about 38 million pounds from the record level of 1955 is expected in Greece due both to smaller acreage and lower yield. The reduction forecast for Greece alone more than offsets the estimated increases for Syria, Lebanon, Iran, Italy and the Iron Curtain countries.

FLUE-CURED TOBACCO: Estimated acreage and production in North Temperate Zone countries harvested in second half of calendar year 1956 with comparisons

Continent and Country	Acreage Harvested				Production			
	Average		1955 1/2		Average		1955 1/2	
	1935-59	1947-51	1947-51	1947-51	1935-59	1947-51	1947-51	1947-51
	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000
	BUCHS	BUCHS	BUCHS	BUCHS	BUCHS	BUCHS	BUCHS	BUCHS
NORTH AMERICA:								
Canada	51	98	98	122	54,616	111,646	118,206	170,000
United States	981	1,010	991	880	863,619	1,266,160	1,433,045	1,276,810
EUROPE:								
Austria	-	-	2/	2/	-	-	33	33
Germany	-	2/	6	6	-	1,500	9,796	11,795
Italy	2	8	15	14	3,800	16,100	26,367	23,289
Spain	-	2/	2/	2/	-	800	2,965	2,965
Switzerland	5	10	12	12	7,670	13,111	13,500	13,500
Other Europe (Incl. U.S.S.R.)	5	10	12	12	7,670	13,111	13,500	13,500
ASIA:								
China	223	302	555	543	235,000	290,000	500,000	525,000
India	46	58	127	118	74,310	86,887	14,850	4,850
Korea	15	13	24	25	21,490	18,990	26,968	31,893
Turkey	-	-	1	1	-	-	800	800
TOTAL	1,333	1,499	1,890	1,771	1,260,884	1,745,194	2,397,065	2,267,900

See footnotes at end of circular.

LIGHT AIR-CURED BURLEY TOBACCO: Estimated acreage and production in North Temperate Zone countries harvested in second half of calendar year 1956, with comparisons

Continent and Country	Acreage Harvested				Production			
	Average		1955 1/2		Average		1955 1/2	
	1935-59	1947-51	1947-51	1947-51	1935-59	1947-51	1947-51	1947-51
	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000
	BUCHS	BUCHS	BUCHS	BUCHS	BUCHS	BUCHS	BUCHS	BUCHS
NORTH AMERICA:								
Canada	9	8	4	4	10,749	10,040	7,005	7,500
United States	372	423	310	312	315,426	552,736	469,977	476,467
EUROPE:								
Austria	-	-	1	1	-	-	1,274	1,052
Germany	2	6	8	9	4,600	13,700	16,755	15,432
Italy	2/	2/	23	33	3,000	6,425	29,640	20,062
Switzerland	2/	2/	1	1	694	1,641	850	850
AFRICA:								
French Morocco	1	1	2	2	500	878	3,086	3,100
ASIA:								
India	2	2	4	4	-	-	2,315	2,425
Japan	-	-	3	4	2,974	8,982	2,459	7,420
TOTAL	386	453	363	377	338,243	599,902	552,586	578,623

See footnotes at end of circular.

OTHER LIGHT AIR-CURED TOBACCO: Estimated acreage and production in North Temperate Zone countries harvested in second half of calendar year 1956 with comparisons

Continent and Country	Acreage Harvested						Production					
	Average		1947-51		1955 1/		Average		1947-51		1955 1/	
	1,000	acres	1,000	acres	1,000	acres	1,000	acres	1,000	acres	1,000	acres
NORTH AMERICA:												
United States												
Maryland	37	49	49	50	28,845	39,112	35,525	43,750				
EUROPE:												
Germany	-	-	1	1	-	-	605	440				
Italy	1	3	3	4	3,400	7,800	7,716	8,377				
Switzerland	2	2	2	3	562	1,407	39	40				
Other Europe (Incl. U.S.S.R.)	60	63	63	63	64,557	54,897	55,000	55,000				
ASIA:												
Japan	-	-	6	6	-	-	9,167	9,178				
TOTAL	98	115	122	124	97,384	103,216	108,052	116,785				

See footnotes at end of circular.

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FIRE-CURED TOBACCO: Estimated acreage and production in North Temperate Zone countries harvested in second half of calendar year 1956 with comparisons

Continent and Country	Acreage Harvested						Production					
	Average		1947-51		1955 1/		Average		1947-51		1955 1/	
	1,000	acres	1,000	acres	1,000	acres	1,000	acres	1,000	acres	1,000	acres
NORTH AMERICA:												
United States	23	11	9	9	18,804	13,005	10,510	11,375				
Virginia	105	51	39	39	84,733	56,803	54,702	53,112				
Ky-Tenn.												
EUROPE:												
Italy	25	37	10	20	4,321	51,400	24,956	26,455				
Other Europe (Incl. U.S.S.R.)	1	1	1	1	511	574	900	900				
TOTAL	154	100	68	69	147,959	122,082	91,068	91,842				

See footnotes at end of circular.

DARK AIR-CURED TOBACCO: Estimated acreage and production in North Temperate Zone countries harvested in second half of calendar year 1956 with comparisons

Continent and Country	Acreage Harvested				Production			
	Average		1956		Average		1956	
	1955-59 acres	1947-51 acres	1955 acres	1956 acres	1955-59 pounds	1947-51 pounds	1955 pounds	1956 pounds
NORTH AMERICA:								
Canada								
Cigar	4	4	5	4	5,102	5,000	5,826	4,500
Other	5	5	3	3	6,089	2,799	3,719	2,000
United States mainland								
One sucker	21	17	13	13	18,959	19,298	18,093	17,485
Cigar filler	19	11	7	7	11,748	11,147	11,779	11,623
Cigar binder	42	43	34	33	53,575	64,583	53,205	55,925
Cigar wrapper	34	40	27	20	47,336	61,065	42,008	31,756
Petique	10	14	13	13	9,108	15,233	15,598	16,612
Perico Rico	2	1	2	2	192	325	150	120
Cigar filler	44	35	36	34	29,393	26,921	32,030	29,000
Other	-	-	1	1	-	-	4,100	1,000
EUROPE:								
Austria	-	-	2	2	-	-	302	238
Belgium	6	5	3	3	16,431	9,432	6,602	6,085
France	40	67	68	69	65,700	103,570	114,512	116,423
Germany	4	3	3	2	7,295	5,500	2,467	2,425
Cigar - Havana and								
Oberdentheilmer	2	2	13	13	41,000	25,800	29,700	28,660
Other	2	2	-	-	33,355	14,182	-	-
Italy	1	7	3	3	1,600	10,000	4,409	4,519
Other	6	12	19	22	8,900	16,000	24,295	28,374
Spain	2	2	25	25	14,322	27,200	35,989	35,990
Valencia	1	1	1	1	1,061	899	745	595
Sweden	-	-	2	2	-	-	617	-
Switzerland	1	1	1	1	1,000	1,641	1,715	1,700
Bernta, Monte	4	9	9	9	4,490	7,155	10,273	8,818
Yugoslavia	319	345	364	364	357,647	320,952	317,550	323,750
Other Europe (incl. U.S.S.R.)								
AFRICA:								
Algeria	29	40	32	32	21,667	23,271	18,361	19,000
France	2	2	1	1	204	400	662	660
Morocco	2	2	2	2	902	1,555	2,204	2,200
Tunisia	2	2	2	2	360	660	1,102	1,100
Arbi								
Soufiri								
ASIA:								
China	501	500	570	570	514,003	500,000	480,000	480,000
India	6	3	2	2	9,772	3,993	1,984	1,984
Turkaki - water pipe	-	-	-	-	-	1,200	-	-
Iraq	-	-	2	2	-	-	-	-
Lebanon	-	-	2	2	-	-	-	-
Tonbac	1	1	1	1	820	900	626	419
Syria	1	1	1	1	386	360	1,700	500
Tonbac	1	1	2	1	-	-	-	-
Turkey								
TOTAL	1,099	1,162	1,256	1,245	1,286,957	1,280,781	1,238,843	1,232,923

See footnotes at end of circular.

LIGHT SUN-CURED TOBACCO: Estimated acreage and production in North Temperate Zone countries harvested in second half of calendar year 1956 with comparisons

Continent and Country	Acreage Harvested				Production			
	Average		1955		Average		1955	
	1935-39	1947-51	1,000	acres	1935-39	1947-51	1,000	pounds
AFRICA:								
Algeria	20	28	24	34	13,000	16,500	20,182	20,000
ASIA:								
China 4/	491	525	525	525	501,818	550,000	525,000	525,000
Japan	44	66	57	58	71,366	112,223	106,248	100,327
Korea	31	31	27	27	35,465	40,090	30,694	32,399
Native								
TOTAL	586	650	643	644	621,649	718,813	682,124	678,226

See footnotes at end of circular.

DARK SUN-CURED TOBACCO: Estimated acreage and production in North Temperate Zone countries harvested in second half of calendar year 1956 with comparisons

Continent and Country	Acreage Harvested				Production			
	Average		1955		Average		1955	
	1935-39	1947-51	1,000	acres	1935-39	1947-51	1,000	pounds
NORTH AMERICA:								
United States	3	3	4	4	2,769	3,330	3,255	4,200
AFRICA:								
Algeria	7	7	4	4	4,000	4,900	1,984	2,000
ASIA:								
China	86	125	105	95	87,818	125,000	105,000	100,000
Iran	14	9	4	4	14,370	7,862	1,830	1,764
Pipe								
TOTAL	110	144	117	107	108,957	141,092	112,069	107,964

See footnotes at end of circular.

ORIENTAL TOBACCO: Estimated acreage and production in North Temperate Zone countries harvested in second half of calendar year 1956 with comparisons

Continent and Country	Acreage Harvested				Production			
	Averages		1955 1/		Averages		1955 1/	
	1935-39	1947-51	1,000 acres	acres	1935-39	1947-51	1,000 pounds	1936 1/ pounds
EUROPE:								
Greece	226	213	323	300	132,819	113,320	222,859	185,000
Turkish								
Italy	40	69	56	58	29,300	52,900	32,187	33,951
Semi-oriental								
Yugoslavia	12	30	77	78	12,348	19,675	60,560	59,524
Oriental (Prelep)								
Semi-oriental (Jaka, Ravnjeh, Trance, Otija)	23	50	21	22	20,572	32,792	20,613	15,433
Other Europe (Incl. U.S.S.R.)	327	331	392	409	305,846	281,615	326,750	340,850
ASIA:								
Iran	15	28	40	47	10,400	17,500	20,944	25,132
Cigarette								
Iraq	-	-	7	7	-	-	4,650	4,850
Lebanon								
Shak al Bent	2	1	2/	2/	780	400	170	170
Latakia and other 5/	2	4	7	7	1,570	3,125	5,113	5,447
Syria								
Abu Riha-Latakia 5/	5	7	3	-	4,300	6,100	2,297	-
Samsun and Baffra	-	-	2	2	-	-	1,304	1,413
Hasan Kayf	-	-	2/	2/	30	20	11	13
Semi-oriental								
Shak al Bent	5	8	11	11	3,100	4,650	7,191	7,339
Frinsawl (Hasab)	-	-	2/	1	-	-	198	1,092
Turkey								
Oriental and Semi-oriental	193	303	378	379	128,119	193,749	247,489	244,455
Hasan Kayf	-	-	1	1	-	-	700	600
TOTAL	350	1,044	1,318	1,322	649,184	725,846	953,016	925,269

1/ Preliminary. 2/ Not available. 3/ Less than 500 acres. 4/ Includes some sun-cured that is partially fire-cured.

5/ Latakia fire-cured.

Foreign Agricultural Service. Prepared or estimated on the basis of official statistics of foreign governments, reports of United States Foreign Service officers, results of office research and other information.

RESERVE

1,943

F114

Missing: 11-1956

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